May 28, 1990

Advertising Age

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LAST MINUTE NEWS

McD grills chicken

OAK BROOK, Ill.—McDonald's Chairman Michael Quinlan told shareholders Friday that domestic sales are running "essentially flat" compared with 1989 as a result of softer consumer spending and aggressive discounting by Burger King. McDonald's also is testing a grilled chicken sandwich that would compete with Burger King's BK Broiler *(see earlier story on Page 4)*.

United unions court exec

ELK GROVE VILLAGE, Ill.—United Airlines' three unions are courting Chrysler Corp. Vice Chairman Gerald Greenwald to run the carrier if an employee buyout succeeds, *Crain's Chicago Business* reported. If the unions convince Mr. Greenwald, 54, to succeed current Chairman-CEO Stephen M. Wolf, it would be a big breakthrough in their efforts to buy UAL. Sources described negotiations as "progressing well but not yet done," adding that if a deal with Mr. Greenwald is sealed, it probably would occur this week.

Parker, Reebok team

BEVERLY, Mass.—Parker Bros. will announce a tie-in with Reebok for a videogame at the June 2 Consumer Electronics Show. Parker said this is the first commercial tie-in with a Nintendo Entertainment System videogame. The game, called "Drac's Night Out," features a character who wears the Pump athletic shoe. Reebok will co-promote the game. Grey Advertising, New York, handles Parker; Hill, Holliday, Connors, Cosmopulos, Boston, is Reebok's agency.

New 'National' edition

NEW YORK—*The National*, the fledgling sports daily, plans to launch a "twilight" or early afternoon edition in New York and Chicago that will include West Coast and late scores. The move is in response to criticism that the newspaper prints too early to include many scores. The launch date of the new edition and circulation haven't been set.

'Playboy' mulls account

NEW YORK—*Playboy* is re-evaluating its relationship with Chiat/Day/Mojo, Toronto, less than two weeks after awarding the agency its

(Continued on Page 6)

INSIDE

Rance Crain answers Rupert Murdoch

Page 29

Cable tests revamp

Restructuring plans could turn off advertisers

By John McManus

ESPN, Cable News Network, MTV and other cable channels may soon see some of their hard-won favor among advertisers evaporate.

Cable systems, with re-regulation hanging over their heads, are recasting their program offerings so viewers pay only for the channels they want.

Cable networks fear that a new payment structure will cut into their coverage, diminish cable ratings and stall the medium's progress as a legitimate competitor for advertisers' mass media budgets.

Instead of grouping ad-supported channels into a single "basic" package, the leading cable systems are starting to restructure their offerings into optional clusters, known as tiering. Cable subscribers then pay separately for services that match their interests—sports, entertainment, information, comedy and adventure.

The restructuring—now being tested by industry leader Tele-Communications Inc., Time Warner's No. 2-ranked American Television & Communications and Cablevision Systems Corp.—is being strongly resisted by the cable networks.

"Tiering cuts down . . . the potential dollars the cable networks can get from advertisers."

"When you talk about diminishing the reach of cable networks, suddenly some of those networks become less viable options to broadcast television advertising," said Joseph Ostrow, New York-based exec VP-worldwide media director at Foote, Cone & Belding. "This may signal the end of that opportunity."

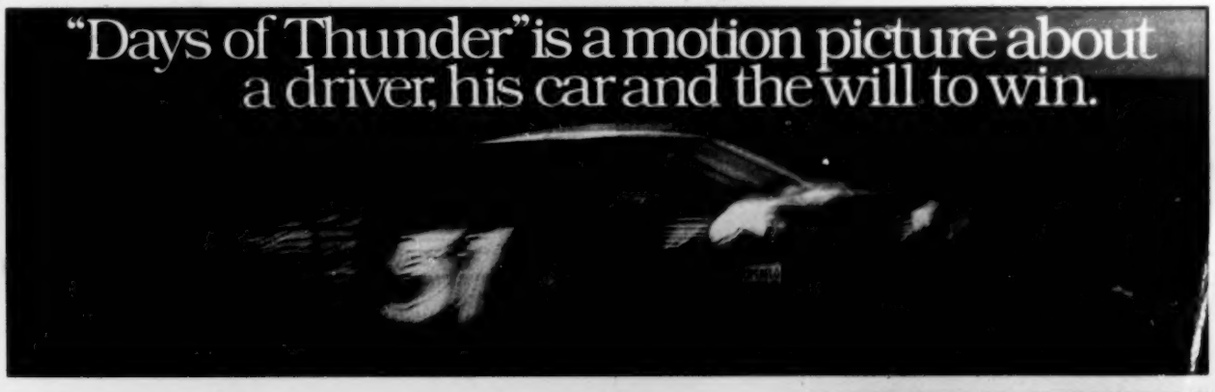
But viewer "choice is going to be where we go with this industry," said TCI President John Malone.

At last week' National Cable Television Association conference in Atlanta, Mr. Malone and other cable leaders said tiering is the only way a system can balance rising program costs with regulatory and consumer group demands to rein in rates.

"We can't continue to add expensive services to basic and increase the price of basic without encountering consumer problems," said Charles Dolan, chairman of Cablevision, the No. 8 U.S. cable company. "Nor do we want to paralyze basic services or remove services. What that says is, you need to let the consumer have access to cable, picking up the services that he really wants."

"Right now, we're trying to fit the whole

(Continued on Page 60)



Coming attractions: Movie tie-ins galore

By Marcy Magiera

LOS ANGELES—It's going to be a long, hot movie-marketing summer.

Such movies as "Days of Thunder" starring Tom Cruise, "Total Recall" with Arnold Schwarzenegger, "Jetsons: The Movie" and "Dick Tracy" are expected to produce the largest number of promotional tie-ins ever with major advertisers in a summer.

Last year, "Batman," "Ghostbusters II" and "Indiana Jones & the Last Crusade" spurred a large number of tie-ins, but as movie marketers strive to push ticket sales past last summer's $2 billion record the race for cross-promotions is heating up.

The three-month period between Memorial Day and Labor Day is the most competitive season at the box office. Close to 50 films will be released, representing about 40% of the year's ticket sales.

That competition and the escalating cost of movie marketing are making tie-in partners a necessity for studios with potential blockbusters to promote.

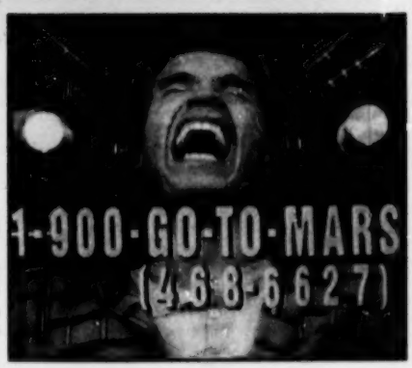
A program of marketing tie-ins, like that for "Days of Thunder" or last year's "Ghostbusters II," can add $20 million to $30 million to a studio's $8 million to $10 million marketing budget.

Walt Disney Co.'s "Dick Tracy" and McDonald's Corp. will team for what will probably be the summer's largest single cross-promotion (AA, Feb. 5). But the largest numbers of marketing tie-ins belong to "Days of Thunder" and "Jetsons: The Movie."

Here are some coming attractions:

■ In the "Dick Tracy" deal, McDonald's will spend $10 million to $12 million on advertising in support of an estimated $40 million game-and-premiums promotion. The McDonald's promotion starts June 15, the

(Continued on Page 58)



Hot flicks in the summertime (from top): "Days of Thunder," "Total Recall" and "Jetsons."

Saatchi puts heat on breakaway shop

By Laurel Wentz

LONDON—Saatchi & Saatchi Advertising's laid-back attitude toward eight staffers who broke away from the agency changed last week when Saatchi launched a flurry of legal action, apparently aimed at harassing the new agency and recovering property.

Writs were served May 23 on seven of the eight individuals who left Saatchi to form Cowan Kemsley Taylor (AA, May 21).

Managing Director Paul Cowan said the writs allege breach of conduct and theft of confidential information. He said unspecified damages were sought and Saatchi demanded all materials in their possession be returned by noon May 24.

"All the material we had has been returned, including personal televisions and stereos that were perks of our jobs," Mr. Cowan said.

"We returned show reels, press cuttings, used Magic Markers, three layout pads and a photograph of the Berlin Wall," he said. "We offered [Saatchi] the opportunity to come 'round and look at our office or our own personal homes."

Mr. Cowan added, "We are required to swear affidavits and submit them to the high court next Tuesday [May 29] regarding certain allegations about property removed" from Saatchi premises.

Saatchi declined to comment.

Since the new agency has taken no clients, Saatchi is expected to drop the legal action following compliance with the writs' request for return of property.

Saatchi has emphasized the eight weren't part of the agency's top management, and Charles Saatchi reportedly remarked he had never heard of any of them.

Sources speculate the new shop's first account could be Reckitt & Colman's $1.5 million Lemsip cold remedy. Reckitt & Colman is moving Lemsip and Disprin aspirin because of a conflict with Procter & Gamble Co., a Saatchi client. Disprin went to Leagas Shafron Delaney Chick last week.

Two other Saatchi executives quit last week to set up a business-to-business direct marketing and sales promotion company for Foote, Cone & Belding. Stephen Fox, managing director of Saatchi & Saatchi Business Communications, and Andy Blackford, creative director at Equator, a Saatchi sales promotion company, said they also aren't taking any accounts with them. □

Coke retools MagiCan

By Patricia Winters and Laurie Freeman

Coca-Cola USA last week told the Food & Drug Administration it's switching to paraffin in its promotional MagiCans to eliminate the possibility of consumers ingesting the chlorinated water originally used.

An FDA official said Coca-Cola contacted the federal agency after discovering some MagiCans had malfunctioned and that one Massachusetts youth drank the liquid (AA, May 21).

"From our point of view, we have no public health concerns with MagiCans," said Chris Lecos, an FDA spokesman.

Coca-Cola is "continuing to monitor and evaluate the situation. At this point, the promotion is proceeding," said Bob Bertini, manager of public relations, North American soft-drink business sector, at the company.

Mr. Bertini said Coca-Cola has found a way to correct the MagiCans that haven't yet been distributed to bottlers, though he declined to elaborate.

An estimated 120,000 of 750,000 MagiCans have already been distributed to bottlers, industry sources say. So far, Coca-Cola has had "fewer than 50" complaints about malfunctioning cans, Mr. Bertini said, compared with 15 complaints two weeks ago.

Robin Gendron, the mother of the youth who drank the liquid inside a MagiCan, declined to comment on whether she's considering legal action.

The MagiCans are specially designed so cash pops out when they're opened. The problem, as explained in TV and print ads the company broke May 23 in 50 newspapers, is that the prize mechanism in some cans is faulty and the money doesn't pop out.

The ads from McCann-Erickson Worldwide, New York, warn consumers not to drink the liquid inside the MagiCan because it's not meant for consumption.

Marketing analysts say that though the botched MagiCans probably won't hurt Coca-Cola's sales or long-term image, it's an embarrassment.

"I disagree that there's no such thing as bad publicity," said Tom Pirko, president of Bevmark beverage consultants. "There's a huge amount of negative attention. . . . It's embarrassing to Coke."

Still, Mr. Pirko and most other experts believe Coca-Cola can't cancel the promotion.

"To cancel would be an admission that something dreadful happened, and it didn't," Mr. Pirko said. "You have to remember that this is a company with a wound, and that is new Coke. They don't make an admission."

Coca-Cola launched the $100 million "Magic Summer '90" promotion for Coca-Cola Classic to top Pepsi in the annual summer marketing battle. Pepsi-Cola Co. has launched "Cool Cans"—with mod graphics and numbers printed inside—that can be redeemed for cash.

Leigh Curtin, manager of public relations for Pepsi, called Cool Cans "fun and non-threatening." She said in the Pacific Northwest, where the promotion was first launched and has just ended, "double-digit incremental growth" was generated. □

ABC wants auto ads early

By Wayne Walley

NEW YORK—ABC-TV is asking automakers to submit prime-time budgets by the week of June 4, an attempt to create the same two-tier marketplace that last year drove upfront network sales to a record $4.2 billion.

"A two-tier marketplace is developing, and it's unfair," said Paul Isacsson, exec VP-director of broadcast programming and purchasing for Young & Rubicam. "The package-goods companies get screwed."

The intense competition among automakers for TV time early on creates a higher tier that helps inflate prices and squeezes available time for non-automotive marketers, which wind up as second-tier players because they get to the market later.

Last year, automakers spent $700 million in the upfront market, which led to overall price increases of between 10% and 17% on a cost-per-thousand basis.

■ **Special Report on the Upfront TV Season starts on Page 33.**

By treating the automakers separately, ABC is hoping to again secure double-digit increases. CBS and NBC are expected to follow suit, industry sources say.

"Here we go again," said an agency executive who asked not to be identified. "So many automotives are out there. They are locked out of some good shows on NBC because of the General Motors deal, so ABC is trying to stampede the market."

General Motors Corp. earlier this month combined ad time on NBC's sports and prime-time programming with time on NBC's cable services in an estimated $500 million to $750 million three-year deal.

The pre-upfront pact has yet to beget more multiyear agreements or start a rush on advanced network sales, but industry sources say the Big 3 networks have quietly made some smaller prime-time deals with select advertisers, including Helene Curtis Industries.

None of the agreements have been near the magnitude of the GM buy, and neither the networks nor any advertiser and agency executives would discuss details.

But now that ABC and NBC
(Continued on Page 60)

IN THIS ISSUE

NEWS

- **Video commercials** get rated "annoying" from consumers in the latest *Ad Age*-Gallup survey **8**
- **Green Giant** aims for growth with a doubled ad budget and numerous new products **20**
- **Some MBA graduates** back away from investment banking careers in favor of marketing positions **54**
- **P&G** falls behind in the fat-free food battle while awaiting FDA approval for olestra fat substitute **55**
- **Hearst Corp.** teams up with Russian daily newspaper in the first U.S.-Soviet joint publishing venture **59**

VIEWPOINT

- Sid Bernstein: The religion/disease debate **24**
- Forum: A closer look at environmental claims **25**
- James Brady: Learning the photographer's craft **29**
- Rance Crain: Thanks Rupert, but no bet **29**

Editorials ..... **24** Letters **28**
Brady's Bunch ..... **25** The Next Trend **29**

The Upfront TV Season

- Phil Guarascio explains how multiyear NBC deal fit GM.
- A daypart-by-daypart examination of TV ad time, plus likely advertisers.
- Cable costs hitting marketer resistance.

INTERNATIONAL NEWS

- Henkel puts big money behind world relaunch **46**

MARKETING TO HISPANICS

- AT&T account shift puts shop out of business **47**

MEDIAWORKS

- Magazines see slight April upswing **48**
- Consumer Linage **49**

PEOPLE

- Victor Linnik does double duty for *Pravda* **50**
- People Moving **50**
- Photo Review **51**

- Snapple Natural Beverage Co.'s "So good, it makes people forget themselves" campaign really is forgettable.

U.S. NewsWatch **12**
Corrections & Clarifications **28**
Classified **52**
For the Record **57**
Index to Advertisers **62**

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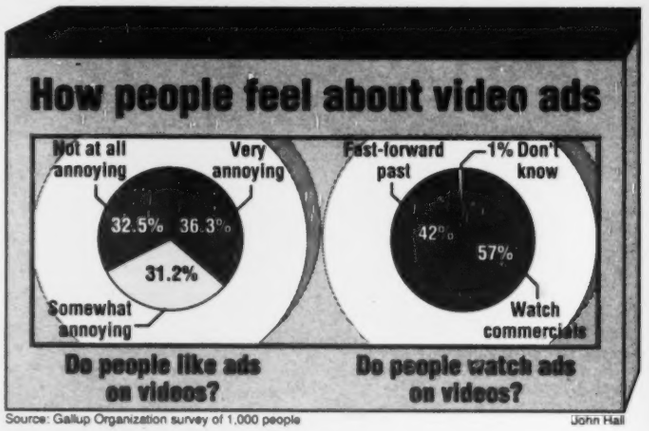
Consumers pan ads on video movies



Source: Gallup Organization survey of 1,000 people — John Hall

By Scott Hume

GALLUP SURVEY

Most consumers who buy or rent movies on video don't want to watch commercials.

That doesn't necessarily mean they *don't* watch the commercials that increasingly precede films on video. But a survey conducted for *Advertising Age* by the Gallup Organization shows that most consumers are at least a little annoyed by that extra 30- or 60-second wait for the feature presentation to begin.

Placing a commercial message on a videocassette seems like a good way to reach consumers: 78% of the 1,000 adults surveyed by phone said they own or at least occasionally rent a VCR.

More than a quarter of the sample (28%) said they had bought or rented a videocassette with a commercial message included on it during the previous three months.

Of those who watched such a video, 57% said they watched the commercial, while another 42% said they fumbled for the fast-forward button to speed through the ad. The remaining 1% weren't sure how they had handled the situation.

But while most may have watched the commercial, they likely weren't pleased about it. More than one-third (36.3%) of the respondents who watch prerecorded tapes described the inclusion of advertising on the tape as "very annoying."

A slightly smaller group held the other opinion: 32.5% judged ads on movie tapes to be "not at all annoying." In between were 31.2% of the sample, who think commercials on tapes are "somewhat annoying."

That's a slightly less forgiving reaction to the marriage of advertising and feature films than was given in a previous Gallup survey. For that poll (AA, April 23), consumers were asked their opinion of commercials airing in movie theaters, and 44% said the practice should be banned, while 35% opposed a ban and 21% were unsure.

Advertisers had the best chance of getting persons ages 18 to 34 to watch their videocassette commercials: 60% of survey respondents in this age group left the fast-forward button alone. Among those ages 35 to 54, 54% watched the commercial, while 59% of those 55 and older kept their seats during the ad.

That middle age group also proved highly critical of video ads as well as impatient with them. Nearly three-quarters of those ages 35 to 54 who rent or buy videos labeled commercials on videos as either "somewhat annoying" (32%) or "very annoying" (41%).

Only 57% of those ages 18 to 34 said they found commercials on videos either "somewhat (29%) or "very annoying" (28%).

Among those ages 55 or older, only 22% said video ads are "not at all annoying." More than three-quarters were either "somewhat" (34%) or "very annoyed" (44%) by them.

The Gallup survey was conducted by phone, using a randomly selected but nationally projectable sample. It has a margin of error of plus or minus 3.1%. □

Tiger breathes easier

Exxon Co. USA next week starts a multimillion-dollar campaign for its Exxon 93 Supreme and Exxon Plus gasolines reformulated to reduce hydrocarbon emissions. In this TV spot from McCann-Erickson Worldwide, Houston, the famous Exxon tiger is shown in a natural habitat to suggest the products' environmental benefits. The gasolines will roll out from Texas to the Southeast in June and to the East by mid-July.

Mercury thinks young

By Raymond Serafin

TEMPE, Ariz.—Lincoln-Mercury is counting on its sporty new Mercury Capri to fashion a more youthful image for the upscale division of Ford Motor Co.

But whether the same dealers who sell large luxury vehicles like the Lincoln Town Car to buyers in their mid-50s can also sell small cars to young buyers is a key marketing question. Ford executives acknowledged that during a press preview here for the Capri and a second small car, the new subcompact Mercury Tracer.

"A lot of our dealers don't like our advertising" for the Capri launch, said Ross Roberts, Lincoln-Mercury VP-general manager.

Some dealers have criticized the absence of a hard sell in the positioning of the Capri as "absolutely . . . a fun car," Mr. Roberts said.

Dissatisfaction with the advertising to selling big-profit automobiles, will be motivated enough to sell the lower-profit cars to prospects who may be the children of their usual customers. The Capri's base price is $12,588, compared with a $27,986 base price for the Lincoln Town Car.

Mr. Roberts and other divisional officials say attracting younger buyers now is the only way to ensure a continued flow of customers in the future.

Lincoln-Mercury will concentrate Capri marketing efforts in 19 cities, most of them on the coasts and in the Sun Belt. These are areas where small convertibles have been most popular. In addition, the automaker believes it can devote more attention to training dealers by limiting the number of markets where the car is available.

"It's the first time we've ever been able to say with the launch of a car that we're going to go regional with it," Mr. Roberts said.

The launch campaign from Young & Ru-

Chiat widens focus to int'l presence

Swedish agency in, S.F. office out

By Alice Z. Cuneo and Cleveland Horton

Chiat/Day/Mojo is turning its corporate eye to Europe while refocusing its U.S. operations.

The Venice, Calif.-based agency last week said it's entering into a joint venture with Hans Brindfors Advertising, a Stockholm-based agency with about $100 million in billings. The Swedish agency's clients include SAS Scandinavian Airlines, Ikea, Absolut, Volkswagen, Audi and Orrefors.

The so-called Pan European Agency Network will start by establishing as yet unnamed agencies in Italy, France and Spain. The joint venture will examine possible acquisitions as well as start-ups in those countries, said Peter de Vaux, Chiat exec VP-chief financial officer.

"Our intention is to develop the association [with Brindfors] further," Mr. de Vaux said, "perhaps leading to a full merger."

The two agencies have swapped "a modest amount of equity," as well as exchanging board memberships, he said.

At the same time, Chiat has agreed to sell its $100 million San Francisco office to local management. Chiat Vice Chairman Fred S. Goldberg, also president of the San Francisco office, is leading the negotiations.

Initially, Chiat will keep a minority interest in the office, though it expects the new managers ultimately to fully own the new agency.

Chiat officials said the agency's new international focus doesn't lend itself to maintaining two offices only 400 miles apart. The San Francisco office was "born out of a regional agency concept," said Bob Wolf, chairman of Chiat/Day/Mojo North America. "It's hard to see how it fits in now in an international network."

Sources suggest the decision to sell the San Francisco office grew out of increasing conflicts between Messrs. Wolf and Goldberg. Mr. Wolf acknowledged that Mr. Goldberg's entrepreneurial approach to running the office prompted the two men to end up "on different ends of an argument."

One of the issues said to precipitate the split was Chiat's decision to drop out of the view of its $20 million account, citing the brewery's shaky financial condition (AA, May 7). Mr. Goldberg apparently fought that decision and, last week, the San Francisco office re-entered the review.

Other observers say Mr. Goldberg lost an internal corporate struggle with Mr. Wolf, who was named Chiat North America chairman late last year. "They have been duking it out for control of the company," said one former Chiat executive.

"Wolf didn't want Goldberg to succeed," said one agency head. "Jay [Chiat] didn't want to cut and run, so he gave Fred a chance to do something with the office."

The San Francisco office has 100 employees and its client roster includes Golden Grain Marcaroni Co., Celestial Seasonings, Dell Computer Corp., Oracle Corp. and Atari Corp.

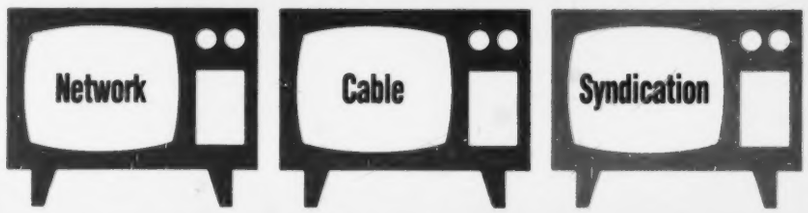
Chiat officials said the agency's new international focus doesn't lend itself to maintaining two offices only 400 miles apart.

Still in question is the future of three accounts Chiat/Day acquired in the merger with Australian agency Mojo MDA last year: Qantas Airways, the Australian Tourist Commission and Koala Springs Australia, each billing about $3 million. Chiat said it hopes to transfer those accounts to Venice; Mr. Goldberg said the disposition of the accounts is unclear.

The regional account group serving Chiat's large Nissan Motor Corp. USA business will remain housed within the new agency's office but will continue to report to Chiat's Venice headquarters.

This marks the second time Chiat has left San Francisco. An office that was opened in 1979 closed one year later. In 1980, Chiat reopened and grew through the acquisitions of Hoefer, Dieterich & Brown and Regis McKenna Advertising (which brought the Apple Computer account). With the Mojo merger, Chiat gained what had once been

Unusually big early deals will have a telling effect; here's a daypart-by-daypart look at how the market falls together



THE UPFRONT TV SEASON

Ante up for the big poker game

By Wayne Walley

The annual $4 billion poker game known as the network TV upfront selling season is beginning.

In June, at least two months of posturing by buyers and sellers come down to four frenzied weeks of serious negotiating and executing deals in network dayparts.

During the upfront selling season, advertisers buy time as much as a year in advance to lock in prices, programs and cost-per-thousand guarantees.

When it is over—probably no later than July 4—the Big Three networks and Fox Broadcasting Co. likely will have sold 85% to 90% of available inventory.

"Our first check of the marketplace shows advertiser budgets to be about the same as last year," a network executive says. "And spending levels in the upfront are almost always higher than our first check."

Movie studios, automobiles and package goods again are viewed as the big upfront players. But few believe these main categories will turn the market into another frenzy.

The automakers, by spending an unprecedented $700 million in upfront last year, caused a panic allowing the Big Three networks to reap cost-per-thousand increases of between 10% and 17%.

But General Motors Corp. already is locked into a three-year deal with NBC worth an estimated $500 million to $750 million for time in sports, prime time and its CNBC and SportsChannel America cable services. Many buyers are hoping that deal is a sign the automotive category will not drive upfront to record high CPM levels again.

"The deal means GM won't be screwing up the upfront market this year," says Paul Isacsson, exec VP-director of broadcast programming and purchasing for Young & Rubicam.

The pact heartened the selling community, however. "[GM] increased spending dramatically last year," a network executive says. "People said it couldn't continue. Then they canceled second-quarter options. This deal shows they're ready to spend at least as much as last year."

An agency executive says the impact of the GM/NBC deal is

(Continued on Page 42)

ONE ON ONE

Guarascio explains how NBC deal fit GM

Still plans to be busy in upfront, though

General Motors Corp. is earning a special place for itself in the annals of upfront TV sales, having signed an unprecedented three-year, $750 million package with NBC-TV just before the start of the upfront selling season.

Advertising Age *dispatched Detroit Bureau Chief Raymond Serafin to talk with Philip Guarascio, GM's executive director of advertising and strategic merchandising, about the NBC deal and other areas affecting the 1990 upfront selling season.*

Advertising Age: *Are you still going to be involved in the upfront market with the other networks?*

Mr. Guarascio: We expect to. We're going into it now with a big piece in place, and I think, frankly, that gives us a little more flexibility on how to deal with the balance of our needs.

AA: *Isn't [the GM-NBC package] a big endorsement of network TV?*

Mr. Guarascio: I think it's an endorsement of the fact that the way advertising is going to be conducted is continually to [seek] a mix. And it's an endorsement of network TV from the standpoint where it's hard for us to see a time when we're not going to require a base of targeted mass media.

But it's not an endorsement of network television to the detriment of any other media type. We have multiyear deals in other media, too.

The program also includes participation looking for indications of where there's a vote of confidence, we looked at those things fairly closely. Within the grand scheme of what's the right media mix, we felt confident about those things.

AA: *What was it about last year's upfront that spurred you on? Were you shut out of some properties you wanted?*

Mr. Guarascio: No, we got [what GM wanted], and we got it the year before, but it was tougher last year.

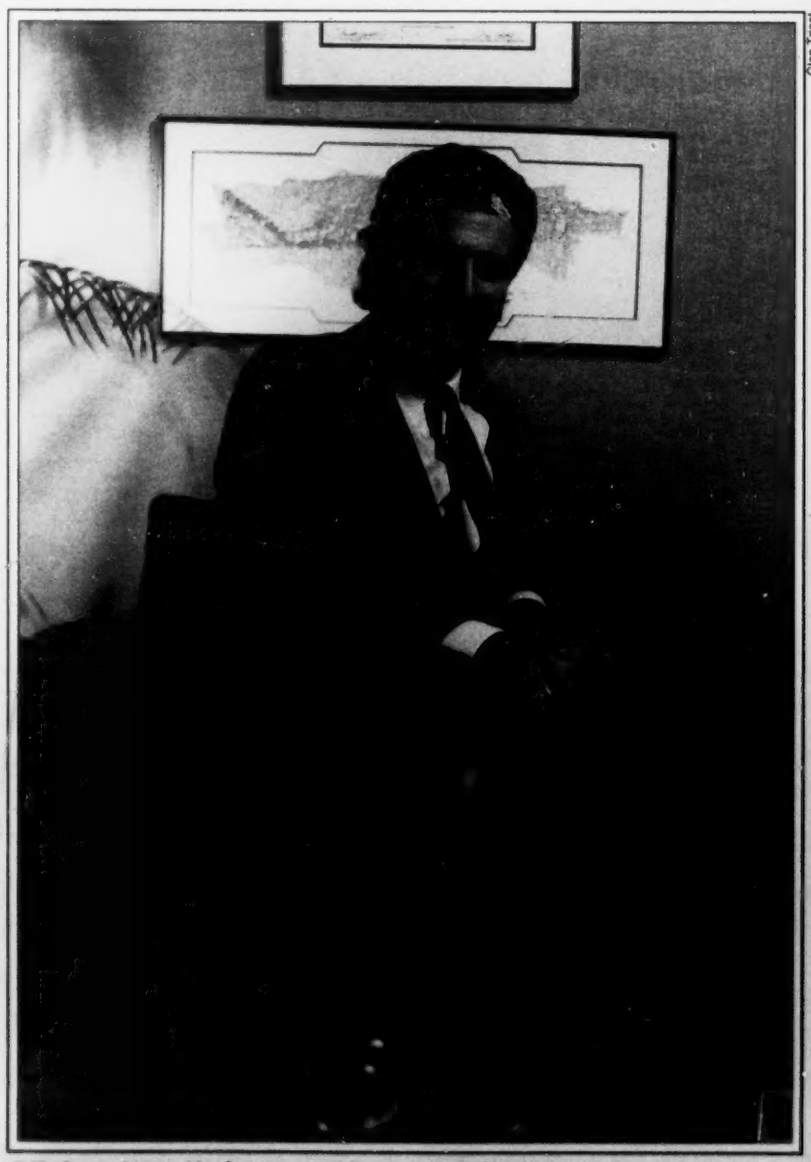
Last year we were cited as breaking the upfront market. We went earlier than anyone; we basically decided to make a very aggressive move and we made some major commitments.

The reason it made sense to make the deal this year, frankly, was that our mix with NBC is to a large degree predicated on the mix we have right now. Our base buy is very rich from the program standpoint.

AA: *You have said that having access to NBC's "selective, highly targeted" programming, which you feel does well against prospective new-car buyers, was a main reason for the deal with NBC. Was that the most important aspect?*

Mr. Guarascio: Intense competitive pressure within the automotive category for key shows triggered the aggressive exploration of ways to satisfy the needs of GM's divisions.

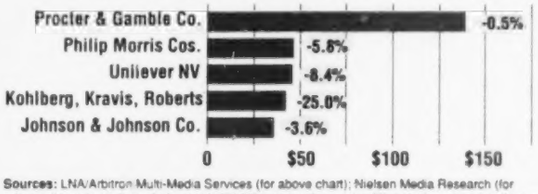
We started thinking about the issue after last year's upfront. We did a tremendous



Glen Treat

Daytime drama intensifies

Leading 1989 network daytime advertisers in millions of ad dollars spent; percent reflects change from previous year.



Sources: LNA/Arbitron Multi-Media Services (for above chart); Nielsen Media Research (for ratings of top shows in each daypart in '89-'90 season shown at right); industry estimates (for top shows' 30-second spot costs and CPMs). **Ad Age graphic:** Holly Seguine

No. 1 daytime show
"The Young and the Restless" (CBS)
Rating—8.0
Cost per 30-second spot—$17,200
CPM women, 18 to 49—$6.51

No. 2 daytime show
"General Hospital" (ABC)
Rating—7.4
Cost per 30-second spot—$19,200
CPM women, 18 to 49—$6.22

No. 3 daytime show
"All My Children" (ABC)
Rating—6.5
Cost per 30-second spot—$17,800
CPM women, 18 to 49—$5.70

Guarascio

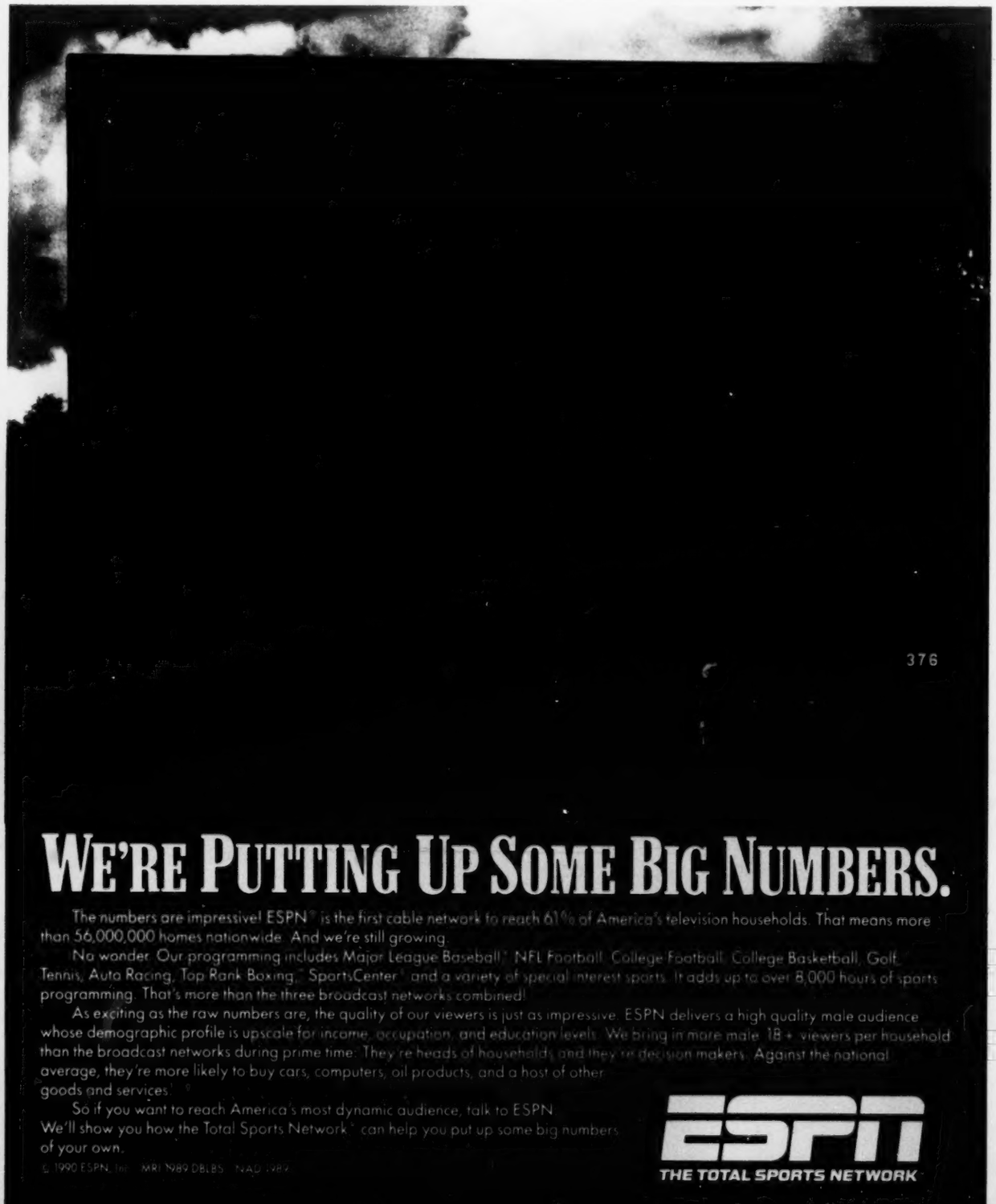
(Continued from Page 33)

amount of modeling and analysis, really looking at the long-term nature of the business, where it was going and what we had to do.

We knew that over the course of the next several years there may be some changes in pricing in the upfront market, and we had a very good indication it was going to happen to General Motors.

As a matter of fact, in the prime-time area, you can argue it could get more intense as we see automotives do more targeting even within their mass-media buys.

The big issue was we had to do all this in a way that enabled us to retain the flexibility our divisions needed in the event of strategic or budget changes. It was important [regarding] inventory, pricing, protection of the marketplace to make sure we had sufficient flexibility to meet whatever needs we couldn't foresee. □


376
WE'RE PUTTING UP SOME BIG NUMBERS.
The numbers are impressive! ESPN® is the first cable network to reach 61% of America's television households. That means more than 56,000,000 homes nationwide. And we're still growing.
No wonder. Our programming includes Major League Baseball,® NFL Football, College Football, College Basketball, Golf, Tennis, Auto Racing, Top Rank Boxing,® SportsCenter® and a variety of special interest sports. It adds up to over 8,000 hours of sports programming. That's more than the three broadcast networks combined!
As exciting as the raw numbers are, the quality of our viewers is just as impressive. ESPN delivers a high quality male audience whose demographic profile is upscale for income, occupation, and education levels. We bring in more male 18+ viewers per household than the broadcast networks during prime time. They're heads of households and they're decision makers. Against the national average, they're more likely to buy cars, computers, oil products, and a host of other goods and services.
So if you want to reach America's most dynamic audience, talk to ESPN. We'll show you how the Total Sports Network™ can help you put up some big numbers of your own.
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THE TOTAL SPORTS NETWORK

Daytime looks to car makers

By Eliot Tiegel

The networks are angling for fresh approaches to selling daytime.

So far, automotive marketers are daytime TV's brightest prospects for building a strong upfront launching pad.

The networks feel they need new product categories to join the backbone of package-goods companies that zero in on daytime's principal demographics: women ages 18 to 49 and 25 to 54.

"We expect to see more autos and some other product categories like sneakers and shoes—the nontraditional categories—coming into daytime," says Jerry Dominus, senior VP-entertainment marketing and sales for CBS-TV, which was No. 1 in daytime television last season, according to Nielsen Media Research.

Nike Inc. and agency Wieden & Kennedy admit to having discussed buying network daytime.

"Most of our business goes to sports programming, late night and some prime time," says a Nike spokeswoman, adding that a move to daytime to grab women viewers is not a foregone conclusion.

While automotives have been slow to enter daytime, things appear to be picking up. Most recently, Subaru of America and American Isuzu Motors have joined the daypart.

"Daytime is the last audience specialty the autos haven't staked out," says Mr. Dominus. "And [an increase in auto advertising] is inevitable when you look at [car] sales and registrations to women."

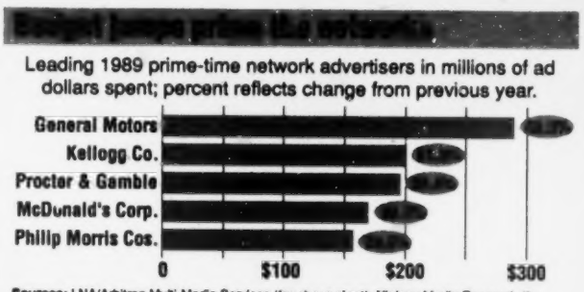
Isuzu recently became CBS' first automotive advertiser during daytime with spots on "The Young and the Restless," last season's top-rated daytime show.

Although soap ratings are down, Larry Hoffner, exec VP-network sales, NBC-TV, believes they are still an attractive buy.

"They skew into the two age groups food and drug people are looking to reach in daytime," he says. "And we do see some minimal interest by the automotives in this daypart."

Andrew Donchin, director of national broadcast for Subaru,

(Continued on Page 38)



Sources: LNA/Arbitron Multi-Media Services (for above chart); Nielsen Media Research (for ratings of top shows in each daypart in '89-'90 season shown at right); industry estimates (for top shows' 30-second spot costs and CPMs). Ad Age graphic: Holly Seguine

No. 1 prime-time show
"Roseanne" (ABC)
Rating—23.3
Cost per 30-second spot—$247,600
CPM, total households—$12.13

No. 2 prime-time show
"The Cosby Show" (NBC)
Rating—23.1
Cost per 30-second spot—$275,000
CPM, total households—$12.86

No. 3 prime-time show
"Cheers" (NBC)
Rating—22.9
Cost per 30-second spot—$316,000
CPM, total households—$14.83

Daytime

(Continued from Page 36)

agency Levine, Huntley, Schmidt & Beaver, uses daytime because it reaches females "who now equally help decide which car the family buys; because it costs less than a prime or news unit; because daytime is one of the few areas for autos where you can get an uncluttered environment; and to reach first-time buyers on college campuses."

With automotive advertising appearing to have limited potential, Mr. Hoffner says, NBC also is talking to beer, sporting goods and athletic shoe companies, which normally don't advertise in daytime.

Beer companies are a poor target for networks that are looking to expand their daytime ad base, says a media director on a large beer account.

Buying time: Daytime

Dan Riordan, broadcast manager, L&L Media, in-house media buying agency for Lever Bros. and Thomas J. Lipton Inc.

Unilever's 1989 U.S. daytime network TV spending: $46.5 million, down 8.4% from 1988.

On declining daytime ratings: "There's been a loss of strength in daytime's performance. The problem is the programming [is] serials and game shows.

"We haven't heard any rumbles about departures from daytime."

Daytime "has been a very successful daypart for us, and a lot of the brands are happy with it."

"The likelihood of beers branching into daytime is very, very remote because of demographics and research," he says. "Basically, the audience demographic for any and all beers is males 21 to 34."

"Beer brands don't want their 'badge' or image feminized with daytime programming," agrees another beer company executive. "We did a little bit of daytime advertising two years ago, but it was a scatter deal and they came to us with such a great offer we couldn't refuse.

"It would have to be a real deal to attract advertisers," he says.

Mr. Hoffner anticipates costs per thousand will continue to rise, although he would not specify how large increases might be.

The vulnerability of ratings is a major concern, concedes ABC-TV's Exec VP-Sales Jake Keever.

But he cites "strong demand for daytime" this season, which may keep costs up even in the face of

On CNN, People Buy What They See.

CNN is making believers out of viewers. Gallup recently reported that CNN is the most believable network on television.*

In fact, CNN's believability score increased while most other television news organizations were experiencing a decline.

From Heads Of Households To Heads Of State.

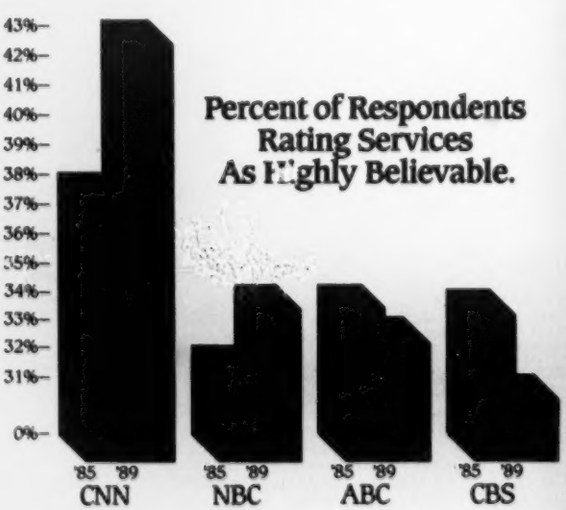
People who turn to CNN for information, and trust what they see

You're Known By The Company You Keep.

It seems only logical that, if you have an audience to address and a story you want them to believe, you're bound to do better in an atmosphere of credibility.

You want to surround yourself with people the viewers know and trust.

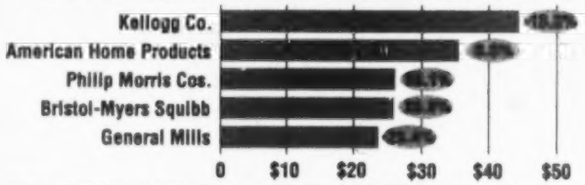
And you want to deliver your message when your audience is in a receptive frame of mind. That is, when they are actively searching for information.



*The Gallup Poll by Times Mirror Center for the People and the Press, November 1989. **1989 SMRB/TBS Projections. ***NHI Decile Analysis, February 1989.

Mixed news on the spending front

Leading 1989 network news advertisers in millions of ad dollars spent; percent reflects change from previous year.



Sources: LNA/Arbitron Multi-Media Services (for above chart); Nielsen Media Research (for ratings of top shows in each daypart in '89-'90 season shown at right); industry estimates (for top shows' 30-second spot costs and CPMs). Ad Age graphic: Holly Seguine

No. 1 network news show
"ABC World News Tonight"
Rating—11.0
Cost per 30-second spot—$58,100
CPM, total households—$5.64

No. 2 network news show
"CBS Evening News"
Rating—10.1
Cost per 30-second spot—$46,700
CPM, total households—$5.10

No. 3 network news show
"NBC Nightly News"
Rating—9.9
Cost per 30-second spot—$50,700
CPM, total households—$5.46

here, belong to a powerful group. They control, for example, nearly 70% of America's household income.**

And in the rest of the world, where CNN is watched in 95 countries, our viewers include Margaret Thatcher, Fidel Castro, Mikhail Gorbachev, Francois Mitterand and King Fahd. They receive CNN in their offices, and are said to watch it faithfully.

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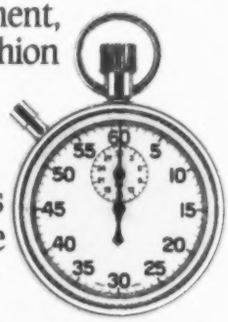

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Television That Interests People Who Aren't Much Interested In Television.

There are many CNN viewers who watch virtually no other television. And 43% are elusive light viewers of primetime network.*** They may not have much time for TV, but they have the means. With a median income 21% higher than the U.S. average,** they're as prosperous a group as you can reach through television.

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Guarantees, pricing drive prime time

By Wayne Walley

Network ratings are down and the Big 3's share of audience continues to slide, but early evening programming on ABC, CBS and NBC is earning its moniker of prime time.

The cost of a 30-second spot averaged about $135,000 in prime time last year, according to industry sources, eclipsing the average price of a 30-second spot in other dayparts by as much as $120,000.

"Network prime time has the kind of audience that is not available in any other daypart," says Arnold Chase, director of network operations for Bozell, New York. "With prime time, you can reach every segment of the audience. No other medium compares."

While agency prognosticators say upfront spending in prime time will remain flat or drop this year, network surveys of the marketplace indicate upfront spending on ABC, CBS, NBC and Fox Broadcasting Co. will at least equal last year's record $4.2 billion for prime time.

The networks hope to get cost-per-thousand increases of between 8% and 12% unless the market is again pushed into panic buying.

Last year, when General Motors Corp. and other automakers nearly doubled upfront spending to an aggregate $700 million, other buyers rushed in and paid 10% to 17% increases to make sure their clients were in the prime-time programs they wanted.

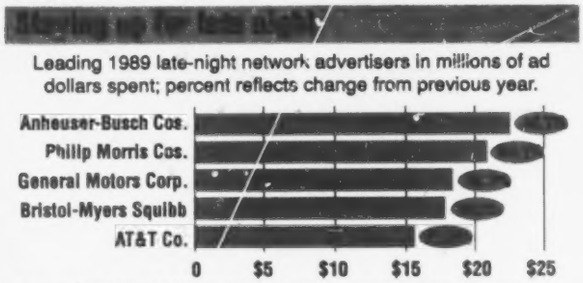
"The only thing worse than paying too much is being shut out," says one chagrined buyer.

This year, however, buyers are buoyed by GM's decision to strike an estimated $750 million, three-year deal with NBC at least a month before the prime-time upfront selling season starts.

"I like the idea that this happened before the upfront," says Allen Banks, exec VP-media director, Saatchi & Saatchi Advertising, New York. "Maybe now we can get beyond the feeding frenzy mentality and deals can be thought out."

NBC, however, could now push for higher prices. With a base laid in, some expect the top-rated network to be bullish in pricing.

It "could be beneficial to the entire upfront market," says Alan Gottesman, an advertising industry analyst with PaineWebber. The GM/NBC deal "accounts for a certain amount of the cream, which means there will be a scarcity of the cream of the crop in programming. It may not help



Sources: LNA/Arbitron Multi-Media Services (for above chart); Nielsen Media Research (for ratings of top shows in each daypart in '89-'90 season shown at right); industry estimates (for top shows' 30-second spot costs and CPMs). Ad Age graphic: Holly Seguine

No. 1 late-night show
"The Tonight Show" (NBC)
Rating—5.6
Cost per 30-second spot—$38,700
CPM, total households—$7.31

No. 2 late-night show
"Nightline" (ABC)
Rating—4.6
Cost per 30-second spot—$39,500
CPM, total households—$8.68

No. 3 late-night show
"Late Night With Letterman" (NBC)
Rating—3.4
Cost per 30-second spot—$23,700
CPM, total households—$7.32

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TNN

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Prime time

(Continued from Page 39)

NBC as much as ABC and CBS, but it will help the networks."

While some have suggested other advertisers will pay higher prices than GM for the remaining NBC inventory, Arthur Kesteloot, manager of advertising & media relations for Chrysler Corp., says, "The network people have to be judicious."

GM competitors could show extra interest in top ABC and CBS programming, but the NBC deal means GM also can be tougher with those two networks.

"If prices from ABC and CBS don't suit GM's fancy, GM can go in the scatter market. There isn't as much pressure now to make a fast upfront deal," an agency source says.

Nevertheless, ABC, as the only network to maintain its average rating in prime time last year, could command increases of 12% or more on a CPM basis this year, sources say.

NBC, hurt the worst by a first-quarter ratings shortfall, might be able to get double-digit increases, but most buyers predict the network will get CPMs about 8% higher than last year.

Agency executives are unsure about CBS' future, waiting to see the first fall schedule from new CBS Entertainment President Jeff Sagansky. The lineup will be unveiled later this week.

Fox, by adding a weekly Wednesday night movie and a Friday prime-time schedule, will have a five-night lineup this year.

While pricing is always a concern in upfront negotiations, buyers and sellers of prime time predict ratings guarantees will be a key issue this year.

The networks, saddled with giving away about $150 million in make-goods because of a first-quarter ratings shortfall, want to

Buying time: Prime

Arthur Kesteloot, manager of advertising & media relations, Chrysler Corp.

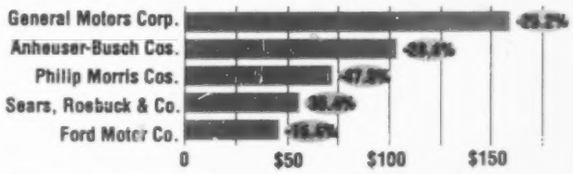
Chrysler's 1989 prime-time spending: $77 million, up 40% from 1988.

On Chrysler's growing interests in many dayparts:

"Prime time is more important now, but we're also planning to use more spot TV, and we're going to be more involved in specials and miniseries. We could even re-express some money into magazines," he says. "But it's not a dramatic shift. We buy network news, morning and late-night TV. I'm also a proponent of experimenting in daytime."

Not playing the game

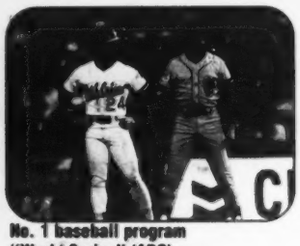
Leading 1989 network sports advertisers in millions of ad dollars spent; percent reflects change from previous year.



Sources: LNA/Arbitron Multi-Media Services (for above chart); Nielsen Media Research (for ratings of top shows in each daypart in '89-'90 season shown at right); industry estimates (for top shows' 30-second spot costs and CPMs). Ad Age graphic: Holly Seguine

No. 1 football program
"Super Bowl XXIV" (CBS)
San Francisco vs. Denver
Rating—39.0
Cost per 30-second spot—$700,000

No. 1 basketball program
"NBA Championship Final" (CBS)
Los Angeles vs. Detroit
Rating—15.1
Cost per 30-second spot—$147,900



No. 1 baseball program
"World Series" (ABC)
San Francisco vs. Oakland
Rating—16.4
Cost per 30-second spot—$310,000

Season

(Continued from Page 33)

still undetermined, but warns, "If panic sets in, we'll have the same frenzy. But if people look at it as easing the pressure, buyers could be more cautious and keep the market in check."

The networks expect movie companies to step up spending to support an expanded slate of new releases.

The movie category usually receives special treatment from networks because companies are willing to pay a premium and forgo guarantees in exchange for particular dayparts and shows that reach target audiences.

Sources say package-goods companies are likely to shift more money into network TV this year as part of a continued trend to cut promotional spending in favor of brand-building advertising.

While networks are optimistic that overall demand will outpace last year's record, advertiser and agency executives are predictably pessimistic, suggesting upfront spending will drop.

"There is significant potential for the upfront market to be less this year," says Arnold Chase, director of network operations for Bozell, New York. "One thing people want to do this year is try to avoid the burn from last year's unanticipated [CPM] increases."

Because most automotives consider TV the most effective medium for new-product introductions, anything is possible this year. Industry sources say a large portion of the GM/NBC deal is likely to encompass the Saturn introduction, and other automotive marketers may feel obliged to step up their pace.

Arthur Kesteloot, manager of advertising & media relations for Chrysler Corp., says the No. 3 automaker would likely spend "about the same as last year" in the upfront marketplace.

Ratings guarantees are a hot topic this season, after an unprecedented drop in TV usage and ensuing first-quarter ratings shortfalls forced networks to give advertisers extensive make-goods.

At the same time buyers are seeking reassurance that networks will deliver ratings during the upcoming season, networks are taking a hard line and contending that if buyers want network time, guarantees may have to be restricted.

"The case of disappearing viewers will haunt this year's upfront," warns one veteran marketer. "It's such a pervasive topic right now and everyone believes the networks will use this as leverage to change guarantees."

Initial network plans might include the resurrection of a controversial "share the risk" formula—in which advertisers assume part of the liability for a ratings shortfall due to changes in technology—used in upfront selling three years ago when Nielsen Media Research switched to people meters.

Networks also could respond by offering flexible pricing if buyers are willing to bend on guarantees.

" 'No guarantees' takes away the uniqueness of upfront buying," says Allen Banks, exec VP-media director, Saatchi & Saatchi Advertising, New York. "It would give us a reason to reconsider [spending upfront]."

"Guarantees come up every year," another marketing executive says. "You can get a cost break for lower guarantees. It's a poker game and it's merely a question of which side blinks first." □

Raymond Serafin in Detroit and Cleveland Horton in Los Angeles contributed to this story.

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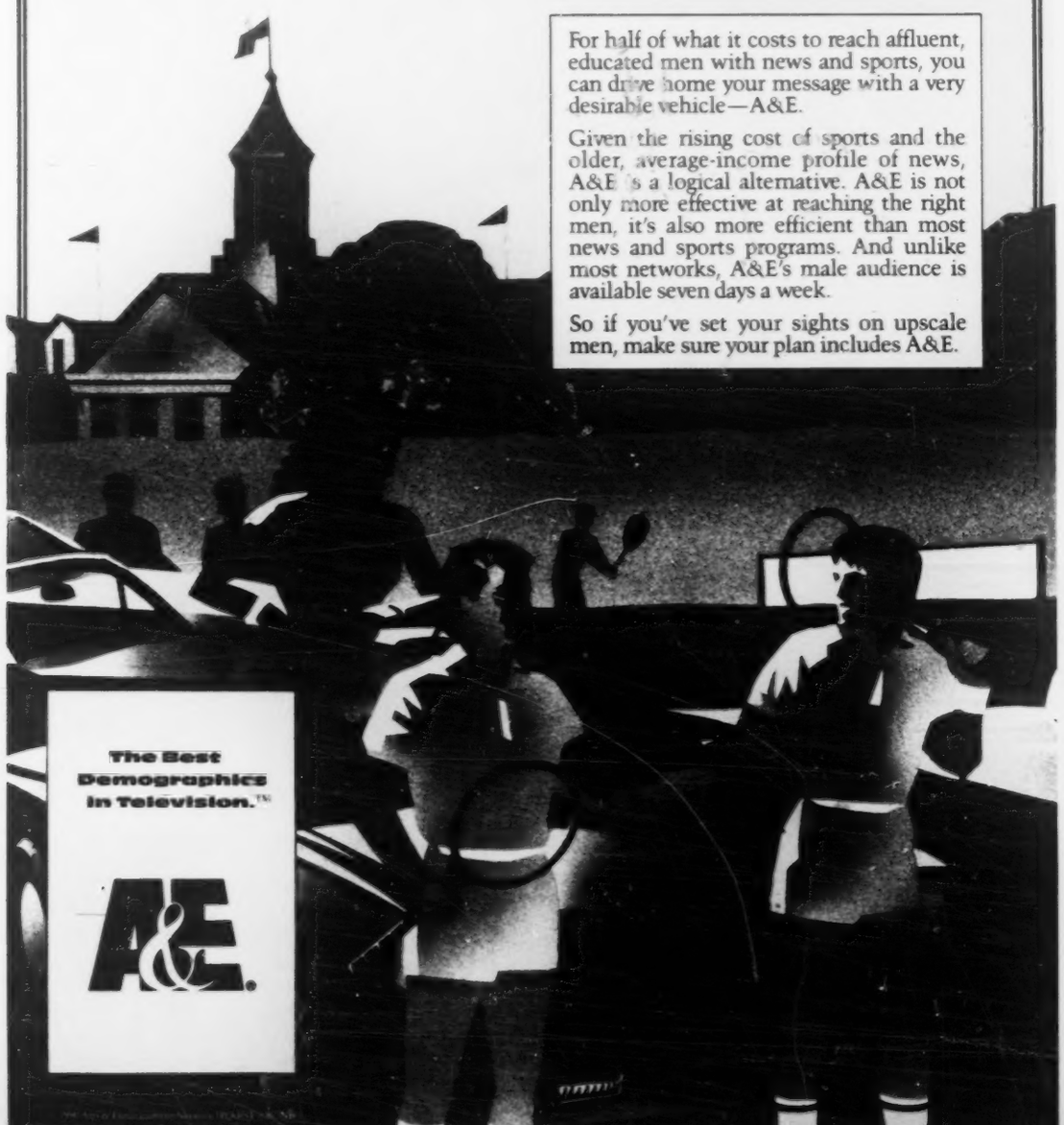

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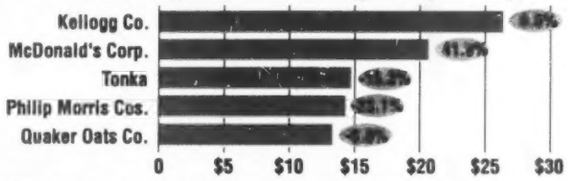
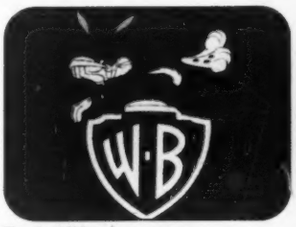
Leading 1989 network children's show advertisers in millions of ad dollars spent; percent reflects change from previous year



Sources: LNA/Arbitron Multi-Media Services (for above chart); Nielsen Media Research (for ratings of top shows in each daypart in '89-'90 season shown at right); industry estimates (for top shows' 30-second spot costs and CPMs). Ad Age graphic: John Hall



No. 1 children's program
"Bugs Bunny & Tweety Show" (ABC)
Rating—6.2
Cost per 30-second spot—$16,100
CPM children, 2 to 11—$5.17

No. 2 children's program
"Slimer! & Real Ghostbusters" (ABC)
Rating—6.0
Cost per 30-second spot—$11,500
CPM children, 2 to 11—$3.15

No. 3 children's program
"Beetlejuice" (ABC)
Rating—5.5
Cost per 30-second spot—$15,100
CPM children, 2 to 11—$4.35

Prime time

(Continued from Page 40)

protect themselves against what they believe is a problem with Nielsen Media Research's ratings.

But the issue of reported TV usage overshadowed the fact network prime-time ratings for the Big 3 this past TV season were the worst in history.

The three-network rating, the percentage of the nation's 92.1 million TV households watching network TV during the 1989-90 prime-time season, dropped to a low of 39.7. The three-network audience share, the percentage of TV sets in use tuned to network prime time, also dipped to 65%.

The drop, however, was not as severe as in previous years and the Big 3 could argue that with Fox added in, the four-network audience share has stabilized at 70%. □

Ratings may spell bad news

By Christine Bunish

While outwardly confident about upfront sales, networks admit plummeting ratings for their news programs could change the way they sell.

"Preliminary indications are that news spending will be up slightly," contends Bob Silberberg, CBS-TV's VP-news marketing and sales.

ABC-TV, ranked No. 1 in news with "World News Tonight" and "Good Morning America," "expects to do very well this season,"

(Continued on Page 44)

Buying time: News

Peggy Kelly, director-media and programming services, Bristol-Myers Squibb Co.

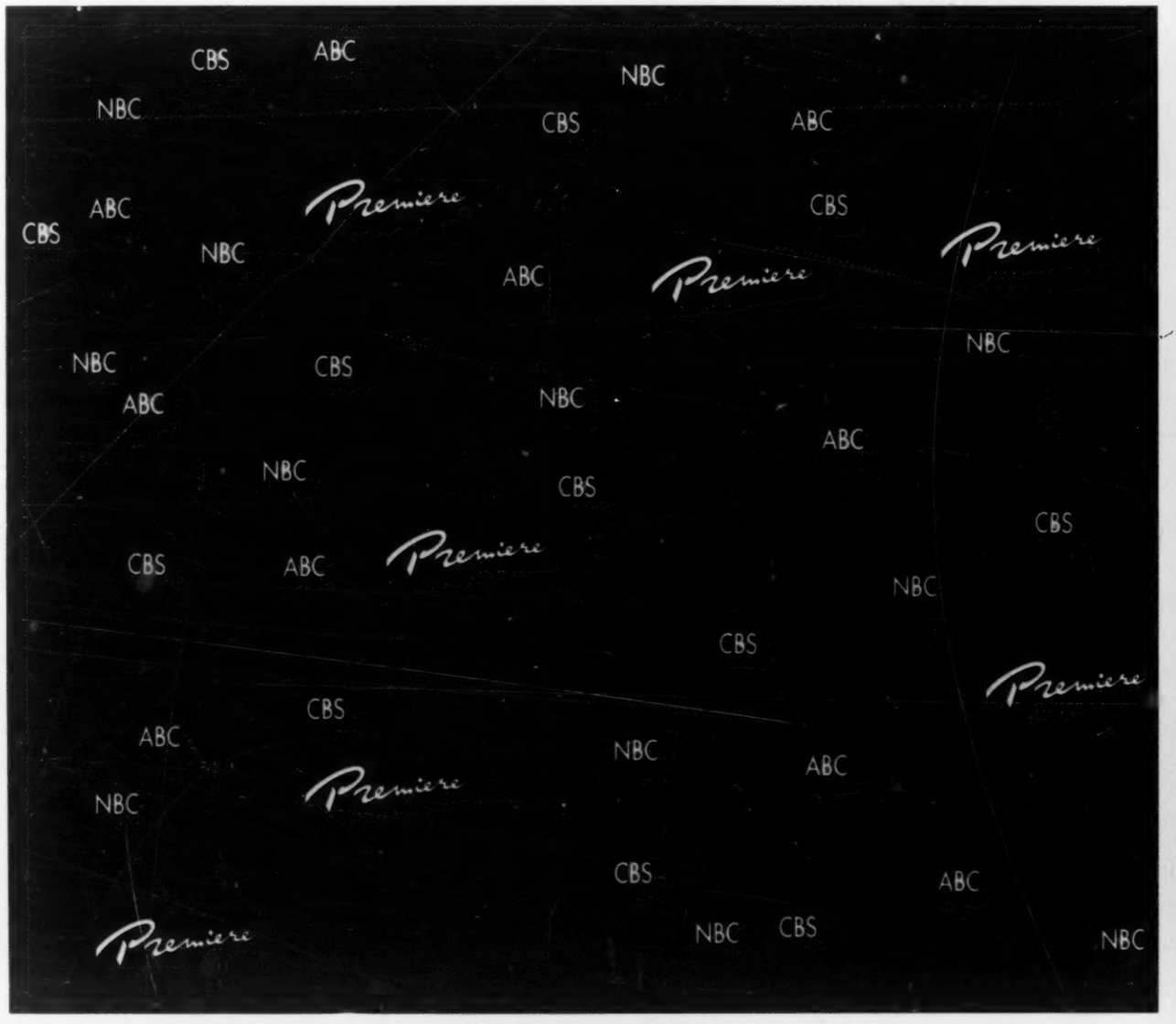
Bristol-Myers' 1989 network TV news spending: $25.8 million, up 28.6% from 1988.

On alternatives to the Big 3:

"There are an increasing number of unwired network alternatives that represent a place for advertisers to go. They're being looked at more seriously this year."

On ratings guarantees:

"Advertisers feel a strong need for guarantees," she says, rejecting networks' plea for easing their guaranteed viewing levels for shows.



PREMIERE.
THE CHOICEST NEWS BUY IN A UNIVERSE OF NEWS BUYING CHOICES.

With all the available alternatives for news buys these days, it's good to know there's one buy that stands out above all.

Premiere Announcement Network. Now in its second year. With guaranteed contracts and 100% station renewal. Advertisers are assured of a news audience that's stable—and consistent. A particularly important issue in an age of unstable and eroding audiences.

Why settle for a lot of quantity or a little quality when Premiere offers you the best of both—a quantity of quality. In today's news buying environment, that's the best news of all.

For information, rates and schedules, call Nick Langone, Director of Sales, at (212) 856-8121.

Premiere
ANNOUNCEMENT NETWORK *The Best News in Media*

Cable costs hit resistance

By John McManus

The dance of the tail feathers has begun" is how one major cable network's top ad sales executive puts it.

While cable networks are pleased they are increasingly on advertisers' minds during the upfront season, they're also learning advertisers won't hesitate to back off if costs are too high.

Many advertisers continue to think of cable as a low-cost alternative to over-the-air TV, and early indications show they will resist network attempts to significantly hike costs-per-thousand.

"You've got to remember that although cable's increasing its total viewership numbers and penetration, most of the best-rated shows on cable [earn] only 1 and 2 [ratings]," says one media director. "There's no way cable channels can charge advertisers at a parity level with the broadcast networks."

The cable networks "have come to us looking for aggressive commercial cost increases, and I don't blame them for it," says Bart McHugh, senior VP-director of national radio and television programming at DDB Needham Worldwide, New York.

"Still, it's our job to get the best deal we can for our clients, and we're going to hold the line as well as we can."

Most of the top-ranked cable networks are expecting advertisers to pay double-digit rate increases on a CPM basis.

"When you compare our double-digit CPM increase to a broadcast network's 9% or 10% increase, the actual out-of-pocket dollar increase is lower for cable," says Lou LaTorre, senior VP, Turner Broadcasting Sales.

Advertisers are expressing long-term interest, perhaps best exemplified by the five-year, $120 million renewal of Anheuser-Busch's ESPN deal.

If the A-B deal is a barometer for advertisers' ever-increasing enthusiasm for cable, estimates that advertisers will increase their upfront cable commitments to $700 million this year from $450 million in 1989 seem conservative.

What's more, advertisers seem anxious to get cable spending plans set early, striking "pre-upfront" and multiyear deals.

Two traditionally big cable spenders recently did just that: Procter & Gamble Co. has committed to spend $50 million with MTV over the next six years; General Mills will spend between $30 million and $50 million on 10 different cable networks over the next two to three years. There are also inklings that McDonald's Corp. is structuring a significant deal.

"If advertiser-supported cable networks represent a 36% share in 70% of the households, that equates to 25% of total viewing," says Steve Kubinsky, director of advertising services for Nestle Foods Corp. Mr. Kubinsky has charged Nestle's agencies to direct 25% of the company's TV budget to cable.

In addition to P&G and General Mills, network ad sales executives believe cable's other big spenders—Time Warner, A-B and Kraft General Foods—again will be active players in cable's upfront, with some hefty increases coming from companies such as Sears, Roebuck & Co.

Sears executives, having indicated a desire to focus on quality program selection, are expected to make upfront buys to get in on the limited desirable inventory.

"We're directing more of our media budget into cable so our marketing is more targeted," says Scott Harding, Sears' national retail advertising manager. "We want to reach more people and different audiences. Cable is perfect for that." □

Kate Fitzgerald contributed to this story.

Auto accessory chains that ignore New York's Hispanics are in for a bumpy ride.

New York's Hispanics spend more than $31 million annually on auto accessories—everything from anti-freeze to oil filters, from tires to mufflers.

Want to reach these car-minded consumers?

Advertise on WNJU 47, New York's #1 Spanish-language station.

It's as simple as that!

WNJU 47
Telemundo in New York

For more information, call
Rosemarie Lieberman (212) 492-5603

Source: SRC's "1988 New York Hispanic Market" report.

News

(Continued from Page 43)

according to Jake Keever, exec VP-sales.

Mr. Silberberg believes double-digit cost-per-thousand increases are likely. But because CBS "is not the demographic leader," he says, "we're not in the position to determine how high is up."

"News has been steady and stable and we expect it to be solid again," says Larry Hoffner, NBC-TV's exec VP-sales.

Bill Hadlock, exec VP-director of media for Leo Burnett USA, says clients will balk at any double-digit increases.

Price and value will have to be in line to keep advertisers from turning to other media.

"We've been making network buys for a number of years based on price-value relationships," states David Braun, VP-media services. Kraft General Foods, whose parent Philip Morris Cos. ranked third in news-time advertising in 1989 by spending $25.9 million.

"If the price-value equation is out of line, it represents an option to change," he says.

Nevertheless, Mr. Hadlock says, "I wouldn't be surprised if there's an increased demand for news above and beyond other dayparts."

Mr. Hadlock doesn't think news programming will draw new advertiser categories. Last year's big spenders are likely to return as major players, he says.

The segment's top advertisers in 1989 were Kellogg Co. with $44.3 million and American Home Products at $35.4 million.

Network sources agree that food products and pharmaceuticals are expected to remain leading advertisers in evening news programming. Mr. Keever believes automotives and household products will spend extensively.

Executives at the Big 3 are concerned with what they see as an aberration in the first-quarter Nielsen numbers, showing decreases in news viewership across the board.

In early evening news during the 1989-90 season, CBS' ratings were down 9% to 10 and NBC's were down 4% to 9.9. ABC showed the only ratings increase, with a 1% rise bringing them a 10.9 rating, according to Nielsen Media Research.

Combined with other changes, a new method of determining or the elimination of guarantees could scare off news advertisers.

"If advertisers get a unit-cost increase on top of a non-guarantee, you're talking about a humongous increase [in CPMs]," Mr. Hadlock says. "Gobs of dollars are going to flow out of news." □

Christine Bunish is a New Jersey-based free-lance writer.

Late night feeling the pinch

By Steve Viuker

CBS is trying to rebound from Sajak; NBC is confident with Carson, Letterman and Costas; ABC is upbeat with Rick Dees; advertisers are high on Arsenio and cable is looming as a major late-night player.

But the picture advertisers paint isn't all rosy.

"Late night is facing the same problem prime time is," says Tony Ponturo, director of media services at Anheuser-Busch Cos., which last year spent $22 million in late night as the daypart's biggest spender. "Alternative viewing habits are taking away from the four networks, Fox included.

"In the last year or two, advertisers [have concentrated on] making sure they cover all their bases," he says.

Non-network competition isn't likely to increase costs-per-thousand, Mr. Ponturo says.

"The main factor for advertisers shifting to late night is the high CPM for prime time. Late night is a cheaper buy than prime."

A-B's track record indicates it may look again to cable during late night.

"We are unique due to our all-inclusive deal with ESPN. Our brands are advertised on most of the key ESPN programming," says Mr. Ponturo.

With the drop in overall network TV viewership, advertisers are looking for low CPM increases.

"We are not going to expect [the networks'] prices to increase any unless the numbers Nielsen reported for the first quarter are not indicative [of true viewer levels]," says Charles Fruit, A-B's VP-corporate media and sports marketing.

Mr. Fruit suggests some advertisers may wait for new data and attempt to get lower prices in the scatter market.

As for new advertisers expected to join the beer and automotive companies that traditionally dominate late-night advertising, sources look to movie companies.

"It runs in 2-to-3-year cycles," says Helen Tocheff, senior VP and associate buying director at Saatchi & Saatchi Advertising, New York. "The next two years will see many new releases, especially in the summers. These films must be heavily promoted to rise above the din. Shows like 'Arsenio Hall' have an attractive audience, but the movie companies will have to move quickly to get a low CPM for 'Arsenio.' "

The movie industry spends $1 billion a year in advertising, says Dick Macedo, president of Wells, Rich, Greene, which handles the MGM/UA account. "Approximately 40% is earmarked for television," he says.

"We go where the bodies are. If Rick Dees is delivering our audience, then we'll go to him. We're looking for avid moviegoers who range in age from 18 to 34."

Mr. Ponturo believes the networks will be aggressive during upfront.

"In late night, you have many advertisers attempting to reach the same target, and the avails are limited. Late night will remain competitive due to the high-demand/limited-supply factor."

Commenting on the late-night viewer drop-off, Mr. Ponturo says, "We have not noticed a drop in late night, but we haven't noticed an increase, either. That may in itself say something." □

Ira Teinowitz contributed to this story. Steve Viuker is a New York-based freelancer.

Buying time: Late night

Robert Ward, exec VP-director of advertising services, Miller Brewing Co.

Philip Morris Cos.' total 1989 late night network spending: $21 million, up 59.1% from 1988.

On cable's late-night potential:

"There are not many cable properties that reach the 21-to-34-year-old target that we are looking for. The reach potential is still small, as are the ratings."

Sports' love affair with the car

By John McManus

Many a network sports sales executive has a similar wish list for the upfront season, starting with General Motors, Ford, Chrysler, Toyota, Honda, Mazda, Nissan and Mitsubishi.

The biggest sports advertisers—automobiles and breweries—customarily make multiyear commitments for sports packages. Consequently, there isn't the same rush for limited weekly series commercial inventory that there is in prime time.

Sports anthology shows, such as "Wide World of Sports," typically aren't programs in which advertisers feel a need to lock in positions; they generally are bought in the scatter market.

That limitation hasn't prevented broadcast and cable networks from mounting an all-out blitz on the auto industry. The goal, in part, is to channel ad dollars into sports rather than other media, including those for upfront dayparts.

Networks hope to strike the ul-

timate upfront deals: four-year commitments that run the length of the newly signed sports TV rights contracts.

Automotive advertisers poured $362.3 million into ABC, CBS and NBC sports in 1989—that's 21% of last year's $1.7 billion network sports ad revenue.

The auto-contributed largesse represents the difference between profitability and calamitous losses for network sports divisions in the first part of the new decade. The Big 3 networks, ESPN and Turner Broadcasting System have to recover the roughly $1 billion they will spend annually over the next several years for broadcast rights.

Advertisers already are grousing the networks should not attempt to pass on those high costs. If advertisers don't bite at high price increases, it's possible a lot of inventory will remain unsold.

The multiyear commitment craze started last year when CBS signed GM and Toyota to a combined $275 million deal for Major League Baseball telecasts through 1993. Others followed.

But while networks expect 20% to 25% of inventory this year to be bought by automotives, there is still uncertainty about which companies will buy the other 75% of sports commercial time.

For this year's fourth quarter, broadcast and cable networks now are selling commercial time for more NFL and college football games than ever before available. In addition, there's the usual complement of baseball playoffs, World Series games, pro and college hoops, the U.S. Tennis Open and the anthology shows.

"The networks need us right now," says Steve Leff, vice-chairman, director-media and administration services at Backer Spielvogel Bates, New York. "And with more channels showing more sports, we don't need the networks. I think there's going to be a lot of unhappy people at the networks. They overpaid.

"Sports is a way of reaching a target, and we may be there," Mr. Leff adds. "The point is, there is a finite price advertisers can pay to reach that target."

One category that has paid the price in the past is beer companies. Anheuser-Busch Cos., Miller Brewing Co. and Adolph Coors Co. last year accounted for $208.4 million of the ad revenues put into network sports.

A-B already has committed $100 million to $120 million to ESPN over the next five years. Historically, Miller has been the first to lock in a position on major sports packages with multiyear commitments, followed by A-B.

But sources indicate Miller may hold back on long-term commitments as it has done on CBS baseball, waiting for prices to come down. If so, A-B will have little reason to make large-scale commitments at premium prices.

For other sports advertisers, "the inventory is going to be out there," says William Sherman, McCann-Erickson's VP-network supervisor. Sports media buyers are talking about "opportunities" as there haven't been in sports since 1985. To the networks, that word translates into "recession."

"I'd make a deal right now at a 0% increase," he says. □

Ira Teinowitz contributed to this story.

Buying time: Sports

Charles Fruit, VP-corporate media and sports marketing, Anheuser-Busch Cos.

Anheuser-Busch's 1989 network sports spending: $103 million, down 28.4% from 1988.

On networks passing on rights fees to advertisers:

"I don't think [CBS] entered into the [Major League Baseball] contract thinking the preponderance of costs could be passed on to advertisers in unit pricing increases." To help make up cash shortfalls from skyrocketing rights fees, Mr. Fruit suggests the networks may be better off creating additional units.

Children's daypart puts on the heat

By Therese Kauchak

The children's upfront market often sets the pace for the wheeling and dealing that follows in other dayparts.

Judging by this year's activity, the pace will be blistering.

Media buyers are trying to put the high cost-per-thousand increases seen in children's upfront —some of which reached 28% on the Big 3 networks—behind them.

"It's a lot more fun when you can decide who you want to do business with and grind out a price," says one agency media buyer. "[Children's] is behind us now. I want to concentrate on the potentially positive situations in the future."

On Saturday morning television, fourth-quarter CPMs to reach kids ages 2 to 11 will be about $10; a 30-second unit will cost an average of $25,000. Last year, the top-rated Saturday morning program, ABC's "Bugs Bunny & Tweety," commanded an estimated $32,000 in the fourth quarter.

"It was a brutal marketplace," says one media buyer. "There was a lot of money and it was expensive. The networks seem to have new categories and a lot of demand on a finite amount of inventory."

The syndication market was kinder, he says.

"It was aggressive, but you have so many alternatives within it that you could pick the best deal on the best show that you wanted. You have far fewer selections to make on networks."

New advertisers include Burger King Corp., which has been absent from the daypart for two years, ConAgra Frozen Foods, Tyson Foods and Nike Inc.

McDonald's Corp., which spent $20.7 million in children's programming during 1989, is believed to have increased spendings, along with veteran kid's advertisers Kellogg Co., Tonka Corp., Quaker Oats Co. and Mattel Inc.

Total expenditures in children's upfront—including network, cable and syndication—reached about $390 million; a 30% increase over last year's total spending. Much of that growth came from syndicated television and Fox Broadcasting Co.'s upfront debut.

The $390 million was split roughly between the Big 3 networks plus Fox on one hand, and syndication on the other.

Of the Big 3, ABC came out on top with about $65 million, while CBS had $55 million and NBC $40 million to $45 million. Fox, with lower ratings for its new shows, rang up $30 million.

Industry sources say syndication accounted for about $190 million, up about 58% from last year.

"That may be off by as much as $10 million on either side, but it means we have had a big jump," says Tim Duncan, president of Advertiser Syndicated Television Association. "We're talking about a 30% to 50% increase in the [children's] syndication upfront market."

The most surprising thing about this year's upfront children's market, he says, "is that we caught up with the networks so quickly." □

Buying time: Kid shows

Michael Evans, media relations representative, Burger King Corp.

On re-entering the children's daypart:

Burger King reportedly spent a multimillion-dollar sum during the upfront sales of children's programming, where the Big 3 networks' CPMs jumped as much as 28%.

Executives didn't cringe at the high network prices, says Mr. Evans. "There weren't any surprises, nothing we hadn't expected," he says. "[Burger King focused] on a mix of [network] Saturday morning, syndicated and cable programming. We'll go with a balance."

Syndicators see 'torrent'

By Eliot Tiegel

Syndicators are being upfront about the broadcast networks' troubles, happily envisioning a robust upfront selling season for their products as network numbers falter.

"It's the marketplace," says Karl Kuechenmeister, senior VP-media sales for Warner Bros. domestic TV distribution. "Advertisers realize it makes good sense to put their money into syndication, which is where network viewers are going."

Last year's run to syndication fare could turn into a torrent, some believe.

"Syndication has arrived as the direct alternative to the networks in terms of clearances, ratings and daypart viewing," says Tim Duncan, executive director of the Advertiser Syndicated Television Association.

"Last year we had $1 billion in advertising revenue, which was a 20% increase, and we'll get a higher share of the dollars this year. We're close to having 30% of the viewers," he says.

Mr. Duncan feels upfront cash is moving to syndication because of networks' precipitous drop in overall viewership.

"We are one of the leading causes for the decline," he says.

The movement of viewers to syndicated fare has led to syndicator optimism about price increases. Mr. Kuechenmeister expects a 5% to 10% increase in syndication costs-per-thousand.

Kraft General Foods "is not taking CPM increases lightly," says VP-Media Services David Braun. Parent Philip Morris Cos. was syndication's top spender in 1989, dishing out $106.8 million, according to Arbitron's Broadcast Advertisers Report.

"We can look for opportunities where there are less increases, like in spot, print and radio," he says.

Mr. Duncan says network TV lineups before 1 p.m—consisting mostly of game shows and reruns—are weaker than syndicated fare.

"A lot of affiliates opt for syndicated shows, and the talk programs have good advertiser acceptance," he says. "Daytime has been a strong growth area for our members."

Advertisers are aware of syndication's draw.

"We see budgets moving from network to syndication, but there's always been a certain amount of that," says Dan Riordan, broadcast manager for L&L Media, the in-house buying agency for Lever Bros. and Thomas J. Lipton Inc.

Parent company Unilever U.S. was one of the top spenders in 1989's syndication market. Agencies are "examining alternatives from painted rocks to local radio and cable," he adds.

Erosion of network shares has gone on for years, agrees Terry Loftus, a Procter & Gamble Co. public affairs rep who nevertheless points to the dropping figures as a reason P&G buys syndication, spot and cable.

Mr. Loftus is unsure whether P&G will spend more this year than the $87 million spent in syndication during 1989.

"We'll continue to be a major player and buy programs that follow our audience," he says.

Mr. Duncan says package goods continue to be the primary syndication advertising category but adds that automotive is starting to make its mark.

"Detroit never bought syndication until recently," says Mr. Duncan, citing General Motors Corp. and Ford Motor Co. as examples. "Detroit is still a big underspender."

"It's evident that automotive spending in syndication is on the rise," says Randall Schroeder, exec VP-media management director at Campbell-Mithun-Esty, which has the Jeep/Eagle account. □

Eliot Tiegel is a Los Angeles-based free-lance writer.

Drugstore chains that ignore New York's Hispanics are in for a big headache.

New York's Hispanics spend more than $44 million annually on drug store items, everything from aspirin to hair spray, from tooth paste to nail polish.

Want to reach these health and beauty-minded consumers?

Advertise on WNJU 47, New York's #1 Spanish-language station.

It's as simple as that!

WNJU 47
Telemundo in New York

For more information, call Rosemarie Lieberman (212) 492-5603

Source: MOR 1987, New York Market.

MEDIAWORKS

APRIL AD RESULTS

Magazines find sales still cool through April

By Scott Donaton

The second quarter has begun just a little bit better than the first quarter ended.

Magazine ad pages were flat for April and down 2.2% for the year to date, the Publishers Information Bureau reports. April ad pages for magazines tracked by PIB were up 0.4% to 16,786.22.

Overall, 65 of the top 100 magazines in ad volume posted declines for the first four months; 35 registered gains.

April ad revenues rose 7.2% to $653.5 million. Year-to-date revenues were up 3.3% to $2.1 billion, PIB reports.

Weeklies are among those worst hit by the ad page slowdown. McGraw-Hill's *Business Week* carried 1,182.28 ad pages through April, down 10.6%. News America Publishing's *TV Guide* was off 14.4% to 1,033.64 ad pages.

Time Warner's *People* was down 4.9% with 1,061.64 pages. *Sports Illustrated* had 815.19 ad pages, down 16.4%, and *Time* carried 801.41 pages, a 3.6% decline.

Other newsweeklies didn't fare much better. *Newsweek* was down 6.6% with 689.67 ad pages; *U.S. News & World Report* saw pages dip 2.5% to 581.66 pages.

The New Yorker, with a modest first half last year, remained one of the few weeklies on the plus side through April, up 12.8% with 741.96 ad pages.

Among business titles, every-other-weekly *Forbes* bucked the industry trend and stayed tight on *Business Week's* heels, jumping 33.3% with 1,157.91 ad pages. *Fortune* was down 3.6% with 952.8 pages.

Most business monthlies continued to perform well. *Entrepreneur* was up 7.5% with 677.11 pages. *Financial World* carried 356.02 pages, a 38.8% increase, and *Business Month* was up 8.1% with 137.43 pages.

Personal-finance title *Money* was flat with 401.02 pages, a 0.9% decline; *Changing Times* was down 4.6% with 217.84 pages.

Every-other-monthly *Bride's* led the field with 1,294.98 ad pages, up 5.5%. Rival *Modern Bride* ranked No. 6 with 1,025.24 pages, also a 5.5% increase.

Among fashion magazines, *Vogue* carried 1,000.01 ad pages, down 9.5%, and *Elle* declined 5.7% with 685.55 pages. *Harper's Bazaar* was up 2.2% with 477.8 ad pages; young *Mirabella* had 369.72 ad pages, a 1,000% increase.

Women's service magazines posted mixed results. *Family Circle* led the category with 537.8 ad pages, down 17.7% from last year. *Good Housekeeping* ranked second with 524.47 pages, a 10.5% jump. *Ladies' Home Journal* was also up 1.9% with 498.05 pages.

Rounding out the category were: *Woman's Day*, 450.7 pages, down 20.1%; *Better Homes & Gardens*, 379.2 pages, down 16.9%; *Redbook*, 359.04 pages, up 2.4%; and *McCall's*, 305.64 pages, down 11.5%.

Woman's Day was put on the block by owner Diamandis Communications Inc. earlier this month, partially as a result of the soft advertising environment (AA, May 21).

Ebony led all black-oriented magazines with 370.02 ad pages, down 2.8%. *Jet* had 338.79 pages, down 7.5%, and *Essence* was off 10.3% with 272.72 pages. *Black Enterprise* posted a 5.3% increase with 280.91 ad pages.

Straight Arrow Publishers' *Rolling Stone* carried 552.37 ad pages, down 5.9%. Its *US*, with 225.32 ad pages, was up 8.6%.

Among magazines posting gains through April:

Architectural Digest carried 580.05 ad pages, up 5.5%; *Town & Country* had 492.45 ad pages, up 1.6%; *Vanity Fair*, with 446.09 pages, was up 8.2%; *Metropolitan Home* was up 8.3% with 419.65 pages; *Gourmet* was up 6.3% with 396.83 pages; *Conde Nast Traveler* had 367.77 ad pages, up 17.4%; and *Reader's Digest* rose 2.9% with 350.43 pages. □

35
Of the top 100 magazines in ad volume, 35 showed increases in April . . .

. . . while 65 showed declines, according to Publisher's Information Bureau.

65

John Heiland

Magazine ad-page leaders

Publishers Information Bureau figures through April 1990.

Rank	Magazine	Pages	% chg	Dollars	% chg
1	Bride's	1,294.98	5.5	22,900,540	14.9
2	Business Week	1,182.28	(10.6)	69,458,131	(4.1)
3	Forbes	1,157.91	33.3	50,438,893	43.4
4	People	1,061.64	(4.9)	100,960,813	4.2
5	TV Guide	1,033.64	(14.4)	111,363,737	(6.6)
6	Modern Bride	1,025.24	5.5	16,979,500	10.4
7	Vogue	1,000.01	(9.5)	36,476,165	14.1
8	Fortune	952.80	(3.6)	46,917,561	3.8
9	The Economist	857.71	14.8	7,353,867	30.4
10	New York Magazine	829.62	(7.1)	12,936,556	(2.2)
11	Sports Illustrated	815.19	(16.4)	103,012,827	(6.4)
12	Time	801.41	(3.6)	111,390,241	(1.4)
13	The New Yorker	741.96	12.8	18,868,511	25.8
14	Newsweek	689.67	(6.6)	76,543,904	2.6
15	Elle	685.55	(5.7)	20,282,433	1.0
16	Entrepreneur	677.11	7.5	6,404,860	37.1
17	Cosmopolitan	635.02	(12.9)	37,434,647	(7.3)
18	GQ	621.81	(6.7)	15,092,445	1.7
19	U.S. News & World Report	581.66	(2.5)	46,828,274	6.6
20	Architectural Digest	580.05	5.5	15,538,616	14.6
21	Yachting	574.18	(2.3)	3,453,328	(2.1)
22	Glamour	553.15	(13.0)	28,278,532	(7.1)
23	Rolling Stone	552.37	(5.9)	19,506,202	(3.3)
24	American Way	540.32	(9.7)	7,255,733	14.8
25	Family Circle	537.80	(17.7)	43,940,443	(5.1)
26	W	529.69	(2.7)	12,132,620	12.0
27	Good Housekeeping	524.47	10.5	49,177,267	23.4
28	Travel & Leisure	500.00	(7.6)	20,028,231	15.6
29	Ladies' Home Journal	498.05	1.9	35,088,418	14.3
30	Town & Country	492.45	1.6	11,982,005	19.0
31	Golf Magazine	490.76	(12.4)	14,283,522	(1.0)
32	Sunset	487.32	(5.2)	15,038,084	6.5
33	Mademoiselle	479.84	(8.7)	15,782,708	1.8
34	Harper's Bazaar	477.80	2.2	12,725,288	11.1
35	Golf Digest	476.76	(0.2)	23,075,007	(0.5)
36	Salt Water Sportsman	473.69	(21.9)	3,082,595	(21.0)
37	Woman's Day	450.70	(20.1)	33,134,519	(15.4)
38	Seventeen	449.48	3.3	12,906,213	3.4
39	Vanity Fair	446.09	8.2	15,417,471	31.0
40	Skin Diver	445.36	1.0	4,113,381	4.1
41	Parents	441.65	(1.7)	18,103,189	2.8
42	Southern Living	435.37	(8.4)	21,367,509	(2.1)
43	Texas Monthly	429.14	8.6	4,700,360	8.6
44	Metropolitan Home	419.65	8.3	13,025,931	9.5
45	Muscle & Fitness	417.00	(24.2)	7,121,966	(6.6)
46	Self	410.09	(3.8)	15,517,302	15.9
47	Money	401.02	(0.9)	24,482,627	(1.4)
48	Popular Photography	396.91	23.8	9,507,961	39.7
49	Gourmet	396.83	6.3	10,587,297	19.0
50	Esquire	387.48	(0.8)	11,584,466	3.5
51	Better Homes & Gardens	379.20	(16.9)	42,476,556	(11.1)
52	Car & Driver	376.63	(4.3)	14,300,942	(6.9)
53	Ebony	370.02	(2.8)	12,892,747	6.6
54	Mirabella	369.72	1,000.0	5,637,279	100.0
55	Conde Nast Traveler	367.77	17.4	10,316,310	44.2
56	San Francisco Focus	359.62	(8.7)	2,385,920	0.4
57	Redbook	359.04	2.4	22,264,753	3.6
58	Country Living	356.10	(7.4)	14,505,634	(1.5)
59	Financial World	356.02	38.8	8,324,442	69.6
60	Bon Appetit	350.63	11.1	10,634,421	17.8
61	Reader's Digest	350.43	2.9	36,663,031	14.0
62	Bicycling	349.08	(8.4)	4,830,322	7.5
63	House & Garden	346.92	22.6	8,572,381	27.2
64	Jet	338.79	(7.5)	5,689,172	2.8
65	Smithsonian	332.12	(5.3)	14,221,345	(0.8)
66	Working Woman	330.06	(5.2)	9,956,491	0.9
67	Road & Track	329.18	(10.0)	9,740,578	(11.7)
68	Bassmaster	319.61	(20.6)	6,239,605	(9.6)
69	Inc.	308.95	(18.1)	12,997,373	(7.9)
70	McCall's	305.64	(11.5)	21,684,841	(5.3)
71	New Woman	301.35	(13.0)	7,432,568	(7.0)
72	Art & Antiques	295.64	13.8	1,721,489	21.5
73	Ski	292.79	(13.0)	5,885,012	(3.2)
74	Field & Stream	292.15	(14.6)	11,901,847	(15.2)
75	Four Wheeler	288.52	(5.4)	2,177,054	2.6
76	Delta Sky	285.81	(7.9)	7,293,395	(1.6)
77	Sports Afield	282.27	(8.2)	5,173,837	3.9
78	Black Enterprise	280.91	5.3	3,740,190	14.4
79	Essence	272.72	(10.3)	6,646,785	1.1
80	Outdoor Life	269.63	(25.5)	7,933,764	(17.6)
81	Motor Trend	268.85	(14.2)	9,779,788	(6.7)
82	M	267.65	(8.8)	3,312,014	3.8
83	Yankee	257.87	(1.2)	3,031,776	5.1
84	Premiere	257.64	8.9	4,461,969	32.0
85	Hot Rod	257.40	(26.7)	5,962,307	(23.9)
86	Popular Mechanics	256.47	(16.9)	8,114,016	(9.3)
87	California	247.10	8.8	3,246,653	11.7
88	Working Mother	243.09	0.8	5,237,367	14.5
89	1,001 Home Ideas	242.74	7.9	7,172,882	29.6
90	Connoisseur	238.13	(21.7)	4,280,377	(12.6)
91	House Beautiful	236.43	(8.2)	8,642,642	2.0
92	Popular Science	235.99	(30.6)	6,682,915	(27.2)
93	Southern Accents	235.29	18.4	2,318,990	29.1
94	Home	232.14	(3.8)	6,662,763	6.1
95	Tennis	230.17	(10.4)	7,112,238	32.2
96	Skiing	230.01	6.3	4,738,530	(0.6)
97	US	225.32	8.6	8,285,301	1.8
98	Playboy	223.00	(10.3)	14,781,004	(1.1)
99	National Journal	222.83	(14.0)	1,516,165	(6.5)
100	True Story	221.58	5.2	3,115,971	(1.4)

Percent change comparison information based on 1989 with 1988. Source: Publishers Information Bureau

NEWSSTAND

Print advertising opportunities.

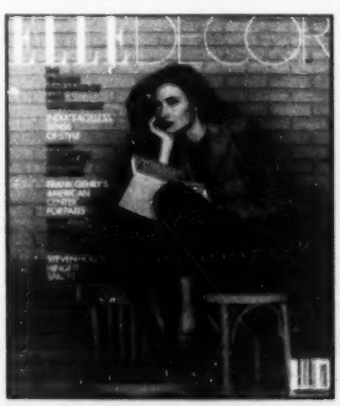
Design News, Newton, Mass., "Design engineering in the 1990s" special editorial section, July 9 issue; ad close: June 4. B&w page: $6,915.

ABA Journal, Chicago, "Product catalog" special advertising insert, August issue; ad close: June 5. B&w ¼-page: $2,000.

Town & Country, New York, "Fall fashion" special editorial section, August issue; ad close: June 5. B&w page: $21,125; color page: $27,190.

Self, New York, "The shoe fits" special ad section, September issue; ad close: June 7. B&w page: $25,860; color page: $38,620.

Philadelphia, Philadelphia, "Best of Philly" special advertising section, August issue; ad close: June 8. B&w page: $6,295; color page: $9,380.



September issue; ad close: June 10. B&w one-ninth page: $950.

New York, New York, "Summer pleasures" special editorial section, July 2 and 9 double issue; ad

Village Voice, New York, "Summer film" special editorial supplement, June 19 issue; ad close: June 11. B&w page: $6,300; color page: $7,150.

Decorating Remodeling and **Kitchen & Bath Business**, New York, "Renaissance" special ad sections, October issues; ad close: June 15. Color page: $316,000.

Parade, New York, "It's too hot to cook!" special editorial section, July 29 issue; ad close: June 15. Color page: $316,000.

Atlanta Business Chronicle, Atlanta, "Metro market report" special editorial section, July 16 issue; ad close: June 18. B&w page: $2,370; color page: $2,970.

Mother Earth News, New York, "Catalog corner" special advertising section, September issue; ad close: June 19. Color one-ninth page: $1,875.

CONSUMER MAGAZINE AD LINAGE

	April		Year-to-date	
	1990	1989	1990	1989
■ Auto/cycle/rec. vehicles				
AutoWeek (52X)	177.9	156.7	588.6	551.8
Car & Driver C	110.5	116.9	376.6	393.7
Car Collector & Car Classics	16.2	15.3	64.6	67.7
Car Craft	78.7	69.3	253.0	269.7
Circle Track	81.8	92.4	347.9	340.1
Cycle	65.8	56.4	156.2	177.2
Cycle World	63.8	57.0	180.3	182.3
Dirt Rider	40.2	36.9	147.6	127.0
Dune Buggies & Hot VWs	71.0	68.0	267.9	269.6
Family Motor Coaching	159.9	166.4	654.4	725.2
4 Wheel & Off-Road	85.4	92.5	283.7	299.3
Four Wheeler C	81.5	86.6	288.5	305.1
Hot Rod C	79.5	121.1	257.4	351.1
Motorcyclist	53.8	62.2	148.8	171.5
Motor Trend C	77.8	74.0	268.9	313.5
Motorhome	101.4	104.6	375.5	376.2
Rider	46.3	51.8	122.3	141.5
Road & Track C	105.0	105.8	329.2	365.9
Trailblazer	61.0	87.0	185.0	231.0
Trailer Life	93.2	92.6	358.0	378.1
Total Group	**1,650.5**	**1,713.4**	**5,654.5**	**6,037.3**
% change	**-3.7%**		**-6.3%**	
■ Boating & yachting				
Boating	142.1	173.4	621.0	734.4
Chesapeake Bay	49.0	58.1	164.2	199.9
Cruising World	154.0	159.2	473.7	488.3
Lakeland Boating (11X)	90.5	110.5	350.0	400.0
Motor Boating & Sailing	130.4	158.6	514.7	703.4
Sail	109.4	126.4	500.5	497.3
Trailer Boats (11X)	77.7	100.3	317.5	355.5
Western Boatman	31.4	50.8	127.1	101.8
Yachting C	120.9	127.7	574.2	587.9
Total Group	**905.4**	**1,065.0**	**3,642.9**	**4,068.5**
% change	**-15.0%**		**-10.5%**	
■ Civic/fraternal				
Elk (10X)	16.0	13.1	66.2	64.8
Kiwanis	15.3	18.0	71.7	61.2
Lion (10X)	5.3	3.2	16.2	15.7
Rotarian	20.0	10.1	66.5	52.5
V F W (11X)	27.6	25.6	107.3	124.3
Total Group	**84.2**	**70.0**	**327.9**	**318.5**
% change	**20.3%**		**3.0%**	
■ General				
American Health (10X) C	60.8	90.2	211.4	256.6
American Heritage (8X) C	36.7	46.1	113.3	126.3
American Legion	38.1	42.0	155.2	201.5
American West (6X)	29.7	54.1	51.8	75.6
Art & Antiques (10X) C	72.9	63.2	295.6	259.8
ARTnews (10X)	109.0	156.7	455.4	463.0
The Atlantic A C	69.8	77.4	207.0	224.4
Bon Appetit A C	99.6	85.1	350.6	315.7
Cable Guide C	29.0	39.9	117.9	138.3
Changing Times C	54.4	69.8	217.8	228.3
Conde Nast Traveler C	103.6	96.7	367.8	313.2
Connoisseur C	74.3	92.1	238.1	304.0
Consumers Digest (6X) C	—	—	48.1	50.4
Cooking Light C	—	—	131.5	112.2
Ebony C	77.5	92.4	370.0	380.8
European Travel & Life C	70.6	53.5	170.4	148.0
Food & Wine C	65.3	71.7	213.6	232.9
Games (6X) C	—	—	34.1	27.0
Golden Years (6X)	—	33.3	74.0	125.9
Gourmet C	122.2	127.7	396.8	373.5
Harper's Magazine A C	28.6	30.4	123.0	134.3
Harrowsmith (6X)	—	—	105.0	123.0
Islands (6X)	—	—	112.5	120.7
Let's Live	53.0	42.0	201.0	190.0
Life C	30.8	88.6	178.1	282.3
Modern Maturity (6X) C	35.1	41.5	76.9	83.3
Money C	114.2	126.1	401.0	404.6
Mother Earth News C	—	—	146.8	162.6
National Geographic C	27.0	21.2	97.7	85.5
National Geographic Traveler (6X) C	—	—	98.9	62.8
Natural History C	65.2	54.2	184.0	196.5
New Choices C	48.8	37.0	126.2	152.9
Prevention C	56.5	52.7	211.5	224.8
Reader's Digest A C	88.3	85.9	350.4	340.7
Saturday Evening Post (9X) C	35.9	42.4	113.8	135.6
Smithsonian C	101.8	87.7	332.1	350.5
Town & Country C	133.3	139.7	492.5	484.7
Travel-Holiday C	59.9	52.3	172.6	174.6
Travel & Leisure C	164.4	186.9	500.0	541.1
Travelhost	1,367.3	1,316.1	4,963.7	4,931.1
Vanity Fair C	150.7	146.8	446.1	412.3
Yankee C	68.3	59.9	257.9	261.0
Total Group	**3,742.4**	**3,903.1**	**13,932.0**	**14,212.1**
% change	**-4.1%**		**-2.0%**	
■ Home				
Americana (6X)	—	—	21.6	45.9
Architectural Digest A C	185.7	154.9	580.1	550.0
Better Homes & Gardens C	104.3	134.7	379.2	456.3
Colonial Homes (6X) C	51.5	68.5	98.3	124.3
Columbus Monthly-Homes (4X)	30.5	31.1	57.2	60.9
Country Home (6X) C	83.1	113.0	114.4	157.1
Country Living C	109.4	114.3	356.1	384.7
Family Handyman (10X) A C	32.2	58.2	127.6	183.0
Florida Home & Garden	64.5	77.8	275.0	365.9
Flower & Garden (6X) C	43.8	54.8	94.2	110.6
Home C	76.8	74.6	232.1	241.4
Home Mechanix C	65.8	76.0	167.2	208.8
Homeowner (10X) C	36.8	37.3	96.9	113.5
Horticulture	51.8	47.7	192.4	179.3
House Beautiful C	75.2	73.5	236.4	257.4
House & Garden C	112.9	82.1	346.9	283.0
Metropolis	54.1	57.8	164.9	198.6
Metropolitan Home C	145.8	135.8	419.7	387.5
Midwest Living C	87.5	84.4	128.5	136.6
1,001 Home Ideas C	77.2	57.7	242.7	224.9
Organic Gardening (10X) C	42.2	43.9	184.8	198.6
Phoenix Home/Garden	75.8	77.5	285.9	299.2
Practical Home-owner (9X) C	42.4	26.1	157.8	98.1
San Diego Home/Garden	74.0	75.2	264.3	265.3
Southern Accents (6X) C	100.8	0.0	235.3	198.7
Southern Living C	129.9	141.1	435.4	475.1
Sunset Magazine A C	161.4	159.8	487.3	514.0
Workbench (6X)	37.6	52.7	68.9	92.4
Total Group	**2,152.9**	**2,110.7**	**6,451.3**	**6,811.0**
% change	**2.0%**		**-5.3%**	
■ In-flight & other passenger				
Aboard Group (6X)	—	—	77.5	71.1
Air Group One:				
TWA Ambassador B	41.7	—	156.2	—
Alaska Airlines	67.5	63.7	261.3	238.6
America West Airlines (6X)	70.0	57.0	300.0	259.2
American Way (24X) C	132.7	191.7	540.3	598.6
East/West Network:				
Continental Profiles	60.2	76.8	207.1	252.4
Eastern Review	35.2	62.8	130.4	265.9
Pan Am Clipper	56.8	54.3	185.9	183.6
Southwest Spirit	54.1	79.6	195.3	270.6
Vis A Vis	76.8	89.6	272.2	347.4
Halsey Publication:				
Delta Sky C	76.1	86.1	285.8	310.3
Pace Communications:				
US Air Magazine	61.3	61.9	233.4	210.4
Spirit of Aloha	33.8	23.0	136.4	96.4
Total Group	**724.5**	**846.6**	**2,825.7**	**3,104.5**
% change	**-14.4%**		**-9.0%**	
■ Men's				
Esquire A C	105.5	108.7	387.5	390.5
Firehouse Magazine	45.3	33.7	140.8	138.5
Gentlemen's Quarterly A C	173.6	198.7	621.8	666.1
M Magazine C	65.7	77.2	267.7	293.5
Muscle & Fitness C	117.6	131.5	417.0	550.1
Penthouse A C	52.3	43.9	206.4	194.7
Playboy A C	59.3	52.0	223.0	248.6
Salute (10X)	42.7	22.0	132.7	78.3
Total Group	**661.8**	**668.1**	**2,396.8**	**2,560.3**
% change	**-0.9%**		**-6.4%**	
■ Metropolitan				
Aloha (6X)	—	—	87.8	56.8
Atlanta	83.8	82.5	266.6	244.6
Baltimore	81.9	58.1	243.7	253.1
Boston	110.4	137.4	396.9	523.7
California C	81.2	63.5	247.1	227.2
Chicago	90.8	117.3	355.3	434.3
Chicago's North Shore	90.5	96.0	351.6	384.7
Cincinnati	54.0	51.9	153.3	190.3
Cleveland	53.0	57.6	167.4	204.9
Columbus Monthly	92.3	72.1	242.7	270.8
Connecticut	86.4	129.5	350.2	411.1
D/Magazine	62.6	78.2	216.5	278.2
Detroit Monthly	74.5	77.3	222.8	237.0
Grand Rapids	35.3	43.0	109.1	137.3
Honolulu	50.4	42.3	204.3	295.0
Houston Metro. Mag	111.8	69.0	240.9	198.5
Inside Chicago (8X)	—	—	51.9	78.7
Los Angeles	123.1	149.5	488.0	575.7
Louisiana Life (6X)	—	—	57.3	60.7
Madison	42.0	42.0	149.0	162.0
Memphis	50.0	64.0	207.1	248.8
Mid Atlantic Country	70.0	44.5	169.8	140.9
Milwaukee	79.0	66.2	230.5	202.7
Minneapolis/St. Paul	117.9	114.6	426.6	437.7
Minnesota Monthly Mag	75.1	47.7	250.1	174.3
Nashville	12.1	21.8	50.2	103.3
New Jersey Monthly	82.9	100.9	268.0	342.4
New Mexico	39.4	38.7	167.6	178.2
Ohio	35.8	46.8	185.1	187.3
Orlando	110.0	110.0	396.7	377.7
Pacific Northwest	71.0	65.2	195.9	192.0
Palm Beach Life	68.1	73.2	351.6	387.5
Palm Springs Life	105.1	113.8	594.4	611.3
Philadelphia	146.6	151.4	493.1	539.3
Phoenix	35.2	47.3	160.0	215.1
Pittsburgh	67.3	73.2	248.1	239.2
Rhode Island Monthly	59.4	53.1	202.7	194.8
Sacramento Magazine	72.0	60.2	225.1	205.7
St. Louis	69.5	49.5	195.7	172.7
San Diego	134.2	148.1	498.6	497.8
San Francisco Focus C	111.0	110.8	359.8	394.3
Sarasota	75.0	99.0	405.0	411.0
South Florida Magazine	107.9	114.0	387.1	469.9
Texas Monthly C	114.6	101.5	429.1	395.2
Ultra	49.5	44.2	127.0	179.0
The Virginian (6X)	—	—	46.0	88.0
Washington (10X)	33.8	—	100.0	146.0
Washington-Dossier	50.8	42.5	160.5	142.5
The Washingtonian	149.2	170.3	515.6	663.2
Total Group	**3,516.1**	**3,539.4**	**12,648.4**	**13,762.3**
% change	**-0.7%**		**-8.1%**	
■ Music/entertainment				
Audio	73.3	87.9	325.8	372.1
Dance Magazine	58.3	60.2	256.6	238.0
Playbill	44.3	45.9	169.9	199.1
Video Magazine	71.5	51.3	273.3	236.0
Total Group	**247.3**	**245.3**	**1,025.7**	**1,045.2**
% change	**0.8%**		**-1.9%**	
■ Outdoor & sport				
Alaska	51.8	45.0	174.0	172.8
The American Handgunner (6X)	—	—	113.0	105.0
American Hunter	14.2	15.5	71.5	88.1
American Rifleman	17.8	26.9	86.3	88.5
Backpacker (7X) C	41.8	—	65.4	49.2
Bass Master (10X) A C	75.2	102.4	319.6	402.5
Bicycling (9X) C	135.0	153.9	349.1	381.2
Cross Country Skier (5X)	—	—	73.6	70.5
Ducks Unlimited (6X)	—	—	49.6	51.7
Field & Stream C	67.3	113.5	292.2	342.3
Fishing World (6X)	—	—	128.0	108.3
Florida Sportsman	138.3	141.2	597.5	608.0
Golf Digest C	120.5	137.1	476.8	477.5
Golf Illustrated C	63.1	62.7	179.9	175.7
Golf Magazine C	95.6	110.8	490.8	560.2
Gun Dog (6X)	—	—	72.2	88.2
Guns	35.0	37.0	161.0	144.0
Guns & Ammo	39.4	42.7	185.3	186.1
In-Fisherman (7X)	82.0	94.0	322.5	389.5
Outdoor Life C	75.7	112.8	269.6	361.8
Outside Magazine	81.7	90.1	238.0	237.8
Petersen's Hunting	38.2	39.8	136.7	161.4
Runner's World (12X) C	43.8	58.3	124.7	144.7
Salt Water Sportsman C	90.6	119.3	473.9	606.8
Shooting Times	28.3	32.5	124.1	129.6
Sierra (6X)	—	—	69.5	103.6
Ski (8X) A C	45.0	51.2	292.8	336.4
Skiing (7X) A C	—	—	230.0	216.4
Skin Diver C	120.1	117.8	445.4	441.1
Southern Outdoors (9X)	41.0	56.9	193.0	262.7
Southern Saltwater (8X)	47.9	51.1	188.0	234.6
Sport Magazine C	27.6	28.5	114.0	139.5
Sports Afield C	76.9	80.3	282.3	307.4
Surfing	69.7	76.7	276.7	294.9
Tennis C	64.6	90.0	230.2	256.8
Waterski (9X)	83.6	94.3	244.0	267.3
Western Outdoors (10X)	43.4	45.6	166.6	184.4
Wildfowl (6X)	—	—	41.8	39.8
Wing & Shot (6X)	—	—	31.5	31.5
World Tennis C	48.8	76.4	141.3	195.3
Total Group	**2,003.8**	**2,304.2**	**8,521.2**	**9,423.6**
% change	**-13.0%**		**-9.6%**	
■ Photography				
American Photo (6X) C	—	48.3	86.7	129.1
Petersen's Photographic	27.7	36.8	88.8	107.0
Popular Photography C	104.2	92.9	396.9	320.7
Total Group	**131.9**	**177.9**	**572.4**	**556.8**
% change	**-25.9%**		**2.8%**	
■ Science/electronic/mech				
Discover C	32.4	31.5	146.3	162.7
Home Office Computing C	39.0	44.5	206.9	186.1
Omni C	45.3	61.5	210.1	244.9
Personal Computing	101.0	177.0	519.0	713.0
Popular Mechanics C	75.8	99.0	256.5	308.6
Popular Science C	76.6	123.4	236.0	340.3
Scientific American C	35.6	50.0	138.3	160.4
Spectrum C	47.6	53.3	207.0	247.7
Total Group	**453.4**	**640.2**	**1,920.1**	**2,363.6**
% change	**-29.2%**		**-18.8%**	
■ Woman/fashion/service				
Beauty Magazine (10X)	13.2	25.5	43.7	40.7
Bride's Magazine (6X) A C	504.3	489.8	1,295.0	1,227.1
Cosmopolitan A C	192.1	222.6	635.0	728.7
Elle C	241.6	224.2	685.6	726.7
Essence C	73.5	71.5	272.7	304.0
Family Circle (17X) A C	184.9	213.2	537.8	653.5
Glamour C	194.4	230.4	553.2	635.9
Good Housekeeping A C	156.2	127.3	524.5	474.6
Harper's Bazaar C	127.6	149.7	477.8	457.5
Health C	39.7	35.2	143.9	126.2
Images	133.0	107.4	384.1	296.1
Ladies' Home Journal C	148.7	149.0	498.1	489.0
Lear's C	53.5	43.9	220.5	214.7
Mademoiselle C	166.9	178.5	479.8	525.4
McCall's C	72.5	87.8	305.6	345.2
Military Lifestyle (10X)	45.6	32.1	169.2	167.7
Mirabella	84.2	0.0	369.7	0.0
Modern Bride (6X) C	393.8	360.2	1,025.2	972.1
New Woman C	91.8	112.2	301.4	346.5
Parents Magazine A C	138.0	124.0	441.7	449.1
Redbook C	92.6	97.2	359.0	350.7
Savvy C	34.3	49.0	140.0	188.8
Self C	117.9	132.4	410.1	426.2
Seventeen C	153.9	138.1	449.5	435.1
Shape C	54.1	77.5	199.1	255.3
Soap Opera Digest (26X) C	39.5	43.3	135.7	142.5
Soap Opera Update	11.8	11.0	27.0	36.0
Teen Magazine	44.3	50.6	173.1	151.7
True Story A C	56.2	50.5	221.6	210.6
Vogue C	289.3	330.4	1,000.0	1,104.9
W Magazine (26X) C	136.1	115.0	529.7	544.5
Weight Watchers C	37.3	40.3	150.6	140.6
Woman (10X) C	24.0	29.7	95.4	114.5
Woman's Day (15X) A C	119.4	138.6	450.7	564.0
Workbasket	25.0	21.9	87.0	101.2
Working Mother C	66.6	72.2	243.1	241.1
Working Woman C	79.4	102.7	330.1	348.0
Total Group	**4,436.9**	**4,484.8**	**14,365.9**	**14,546.2**
% change	**-1.1%**		**-1.2%**	
■ Youth				
Boys' Life C	15.2	19.9	73.8	77.6
Campus Life (10X)	37.8	37.7	177.8	190.7
Total Group	**53.0**	**57.6**	**251.6**	**268.3**
% change	**-7.9%**		**-6.2%**	
■ Business/national				
Barron's	149.4	138.7	560.0	540.7
Black Enterprise C	50.5	49.0	280.9	266.8
Business Month C	29.2	49.1	137.4	127.1
Business Week (52X) A C	426.3	430.3	1,182.3	1,321.9
Entrepreneur C	166.4	161.5	677.1	629.8
Financial World (26X) C	111.0	82.7	356.0	256.5
Forbes (26X) C	479.0	240.4	1,157.9	868.9
Fortune (26X) C	327.9	386.3	952.8	985.7
Frequent Flyer	39.7	52.9	152.7	172.2
Futures	54.5	53.1	204.2	207.1
Inc. Magazine C	72.2	140.9	309.0	377.3
Income Opportunities	71.1	84.4	243.5	271.5
Industry Week (23X) A	99.8	97.4	353.6	325.6
Nation's Business (12X) A C	20.1	39.1	103.0	144.6
Total Group	**2,096.9**	**1,985.7**	**6,670.3**	**6,498.6**
% change	**5.6%**		**2.6%**	
■ Business/regional				
Advantage-Nashville's Bus. Mo	29.8	36.3	89.7	128.8
Baltimore Bus. Jrnl	77.9	75.9	264.9	291.5
Bus. First of Buffalo	98.4	70.9	308.4	297.6
Bus. Jrnl.-Milwaukee	169.0	117.1	603.1	581.2
Bus. Jrnl.-Sacramento	107.6	82.3	351.8	310.3
Bus. North Carolina	44.2	53.0	144.8	147.7
Capital Dist. Bus. Review (52X)	104.9	73.9	282.3	273.8
Caribbean Business	120.1	133.0	387.0	428.4
Corporate Rpt. Minnesota	47.7	59.6	180.3	226.9
Crain's Chicago Bus. (52X)	185.0	147.5	536.1	515.3
Crain's Cleveland Bus. (52X)	131.3	87.1	292.7	280.4
Crain's Detroit Bus. (52X)	105.8	73.1	349.8	284.0
Crain's New York Bus. (52X)	93.5	63.5	247.6	207.7
Florida Trend (13X)	95.5	111.5	204.8	257.5
Georgia Trend	51.2	62.3	169.3	203.6
Grand Rapids Bus. Jrnl.	57.7	41.4	214.3	176.6
Hawaii Business	54.0	39.8	195.0	167.6
Houston Bus. Jrnl. (52X)	94.0	92.0	293.0	279.0
Indianapolis Business Journal (52X)	164.9	167.1	549.6	585.4
Manhattan Inc. C	46.6	47.3	148.7	170.3
New England Bus. (12X) A	40.0	41.0	135.8	179.3
New Orleans City Bus.	43.4	36.3	193.4	161.0
Pacific Bus. News (52X)	146.1	105.3	406.3	394.3
Philadelphia Bus. Jrnl.	161.8	135.3	504.1	490.5
Pittsburgh Bus. Times (52X)	102.9	132.2	383.5	432.5
Providence Bus. News	80.9	86.8	276.3	308.2
Regardie's/Washington	175.0	179.0	565.0	621.0
St. Louis Bus. Jrnl. (52X)	134.4	118.9	436.7	430.6
Warfield's Monthly Baltimore	69.8	86.2	231.0	240.0
Total Group	**2,833.3**	**2,555.8**	**8,945.1**	**9,071.1**
% change	**10.9%**		**-1.4%**	
■ National Sunday mags				
Parade (52X) C	71.3	65.4	213.3	233.9
USA Weekend (52X) C	65.4	60.6	220.0	212.3
Vista Magazine (52X)	24.1	23.4	66.9	80.5
Total Group	**160.8**	**149.4**	**500.3**	**526.7**
% change	**7.6%**		**-5.0%**	
■ Newspaper Sunday magazine				
Boston Globe	192.2	236.3	707.9	825.2
Chicago Tribune	153.9	109.0	402.0	397.9
Cleveland Plain Dealer	94.5	93.9	230.5	252.4
The Dallas Morning News	71.3	107.7	204.5	265.2
Detroit Free Press	92.0	85.0	195.0	184.0
L.A. Times C	140.4	119.5	351.5	422.1
Louisville Courier-Jrnl.	24.0	29.0	84.0	113.0
New York Times Mag. C	443.6	461.1	1,262.2	1,331.8
Philadelphia Inquirer	133.1	137.0	357.4	361.0
Seattle Times	109.0	79.0	300.0	254.0
St. Louis Post Dispatch	102.2	116.1	296.0	335.3
Toledo Blade Magazine	51.2	37.8	138.0	132.8
Washington Post	130.3	173.3	406.5	532.7
Total Group	**1,737.7**	**1,784.7**	**4,935.5**	**5,407.4**
% change	**-2.6%**		**-8.7%**	
■ Weeklies/bi-weeklies				
The Advocate (26X)	122.0	132.6	517.3	610.6
Army Times Military Group:				
Air Force Times (52X)	185.6	162.2	604.4	604.0
Army Times (52X)	178.9	162.0	593.0	583.1
Navy Times (52X)	196.7	180.7	628.6	667.3
Capper's (26X)	27.8	30.3	127.8	153.7
Commonweal (22X)	13.5	7.9	44.7	36.8
Golf World (40X)	152.5	125.0	600.0	490.3
Grit (52X) A	50.8	40.6	160.3	153.5
National Journal (50X) C	94.3	115.2	222.8	259.0
National Review (25X)	35.9	28.1	102.9	95.6
New Republic (48X)	42.1	39.6	161.2	176.2
New York Mag. (50X) C	308.5	271.5	829.6	893.3
New Yorker C	252.6	202.5	742.0	657.7
Newsweek (52X) A C	216.2	191.2	689.7	738.3
People (51X) C	405.2	312.4	1,061.6	1,116.5
Rolling Stone (25X) C	165.8	175.3	552.4	586.8
Sporting News (52X) C	60.7	63.5	178.3	193.7
Sports Illustrated (52X) A C	236.5	270.9	815.2	975.1
Time (52X) A C	272.2	227.3	801.4	831.5
TV Guide (52X) A C	231.0	314.4	1,033.6	1,207.4
US Magazine (26X) C	80.6	61.9	225.3	207.4
U.S. News & World Report (50X) A C	185.4	154.9	581.7	596.3
Total Group	**3,515.0**	**3,270.0**	**11,273.7**	**11,834.1**
% change	**7.5%**		**-4.7%**	

NOTES: Linage is given in paid ad pages. (X) represents the number of times published each year; publications are monthly unless otherwise specified. A Sectional linage included but prorated to circulation of regional editions. B. Incomplete report not included in group total and % change. C Figures supplied by Publishers Information Bureau. All other figures are supplied by the magazines. Ad Age makes no attempt to verify figures and is not responsible for inconsistencies or errors. Compiled by Kathy Welyki.